VirginiaTech
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HOKIE MART

Requestor User Guide

Virginia Tech Electronic Procurement System

Procurement Department

2014

Revised: 03.13.14

Help Line: 540-231-2020
Help Desk: hokiemart @vt.edu

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Introduction to HokieMart

The Procurement Department is the Virginia Tech department responsible for overall management of the university's procurement system for the provision of goods, services, insurance and non-capitol construction.

HokieMart is the e-procurement (purchasing) system which allows Virginia Tech to provide an effective and efficient e-procurement (purchasing) system for the university. This system, HokieMart, allows Virginia Tech to:

- secure better pricing of commonly-used products
- provide one-stop shopping
- reduce time and effort in the purchasing process
- select goods from online suppliers
- produce cost savings through the use of HokieMart contract suppliers
- improve business practices with the introduction of initial purchase approval
- increase efficiency with the use of central invoicing and electronic receiving
- produce, in conjunction with Banner, accurate and more timely financial information
- increase the flow of purchase orders to eVA

Effective January 2014 HokieMart will have gone through a major interface enhancement. The software vendor SciQuest has upgraded the User Interface for HokieMart. The changes are designed to give the e-procurement software, HokieMart, a new visual design. The original look or interface is referred to as the "Classic" interface (CI) and was tab driven. The new interface or appearance is referred to as "Phoenix" interface (PI) and offers slide-out menus for easier access and a fresher, cleaner look.

Although the home landing page for HokieMart has a new look, the processes that run in the background are unchanged. Some additional search features have been added.

Overview: Roles in HokieMart

Roles in HokieMart are assigned to a particular user based on information received from departments and levels of responsibilities within individual departments and are controlled within the HokieMart application.

Users can view their assigned roles under the **User Access and Security** menu option. If roles need to be changed, complete the HokieMart Departmental Functions form found at: **http://www.procurement.vt.edu/HokieMart/forms.html**. Mail the form to Penny Falck in the Controller's Office.

Requestor

The Requestor is the individual (user) who initiates the **electronic** purchase of goods and services by shopping and creating a "cart." The Requestor has numerous sources to search for commodities and services and place the chosen items in a "shopping cart." After placing these items in the "shopping cart" the Requestor will "check out." After "check-out" is complete, a Purchase Requisition (PR) is created.

On Behalf-of-Requestor

An On Behalf-of- Requestor is an individual who initiates the **electronic** purchase of goods and services "on behalf of" the Requestor who is authorized to use HokieMart.

Approver

An Approver is an individual designated to **electronically** review/edit and approve purchase requisitions within the delegated purchasing authority. The Approver electronically receives the PR for approval. After verification, the Approver may approve the PR or reject part/all of the PR. Approval of the PR creates a Purchase Order (PO) that is electronically delivered to the vendor.

Receiver

The Receiver verifies receipt of goods/services. All or part of the order may be received depending on delivery (backorders, damaged goods, etc.). The Receiver enters HokieMart and **electronically** "receives" the goods/services.

Overview of HokieMart Process

After HokieMart interfaces with Banner, a Banner Purchase Order (PO) number is created by the system.

Typically, a single user may serve as both a Requestor and Receiver. Usually, an Approver has only that single role.

HokieMart provides a central receiving process for the entire university. All invoices created in HokieMart are sent directly to the Controller's Office. Departments continue to receive invoices for direct payments and university contract transactions.

HokieMart is open to the entire university; there should be virtually no paper processing. The responsibility of each user is described in one of three guides:

- Requestor,
- Approver, and
- Receiver.

Quick Guides have also been created to assist various users of HokieMart. The Quick Guides are abstracts from the main user guides. They are designed for quick reference. The Quick Guides break down the user guides into small manageable sections and are subject driven.

General Contact Information

HokieMart	Questions concerning HokieMart functions (rejected/pending PRs/POs), appropriate form usage and procedures, vendor receipt of orders: **HokieMart@vt.edu**, 540-231-2020
Accounts Payable	Questions concerning the payment of invoices, encumbrances, expenditures: Rodney Ratliff at **rodney1@vt.edu**, 540-231-2544
Receiving Invoice Imaging	Questions concerning electronic receiving and invoice images: Brandon Webb at **bwebb13@vt.edu**, 540-231-9308
Banner Reports	Questions concerning Banner Finance reports: Penny Falck at **plfalck@vt.edu**, 540-231-9260
Direct Pay	Questions concerning the use of Direct Pay Form and payment categories: Bettina Simerly at **bbsimer@vt.edu**, 540-231-8616
HokieMart Roles	Questions concerning updating/adding HokieMart roles (Requestor, Approver, Receiver): Penny Falck at **plfalck@vt.edu**, 540-231-9260
International Tax Payments	(US Non-Resident): Janet Kunz, **jakunz@vt.edu**, 540-231-3754
Wire Transfers	Questions concerning wire transfers: April Everhart, **aprilee@vt.edu**, 540-231-8608

Links to HokieMart Information

Additional HokieMart material may be found on the Procurement website:

http://www.procurement.vt.edu/HokieMart/hm.html

Issues of the HokieMart Newsletter, The Cart, may be found at:

http://www.procurement.vt.edu/HokieMart/cart/cart.html

Issues of the HokieMart Bulletin Upgrade may be found at:

http://www.procurement.vt.edu/ under the tab labeled Announcements to the left.

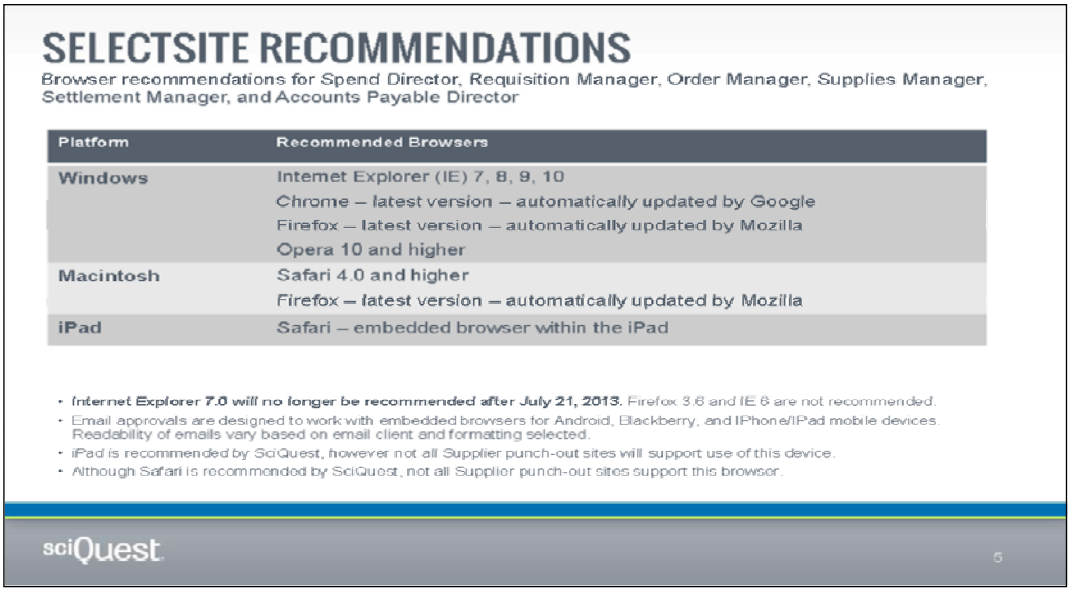
Current HokieMart User Guides may be found at:

http://www.procurement.vt.edu/HokieMart/ug.html

Browser Requirements and Settings

(Revised 07/01/13)

HokieMart is a web-based product and is used in conjunction with the Internet. Currently, Virginia Tech supports Firefox and Internet Explorer as preferred web browsers. Users may access HokieMart from either a PC or Mac.



SELECTSITE RECOMMENDATIONS

Browser recommendations for Spend Director, Requisition Manager, Order Manager, Supplies Manager, Settlement Manager, and Accounts Payable Director

Platform	Recommended Browsers
Windows	Internet Explorer (IE) 7, 8, 9, 10 Chrome – latest version – automatically updated by Google Firefox – latest version – automatically updated by Mozilla Opera 10 and higher
Macintosh	Safari 4.0 and higher Firefox – latest version – automatically updated by Mozilla
iPad	Safari – embedded browser within the iPad

- ***Internet Explorer 7.0 will no longer be recommended after July 21, 2013.*** Firefox 3.6 and IE 6 are not recommended.
- Email approvals are designed to work with embedded browsers for Android, Blackberry, and IPhone/IPad mobile devices. Readability of emails vary based on email client and formatting selected.
- iPad is recommended by SciQuest, however not all Supplier punch-out sites will support use of this device.
- Although Safari is recommended by SciQuest, not all Supplier punch-out sites support this browser.

sciQuest 5

Trusted Site for SciQuest

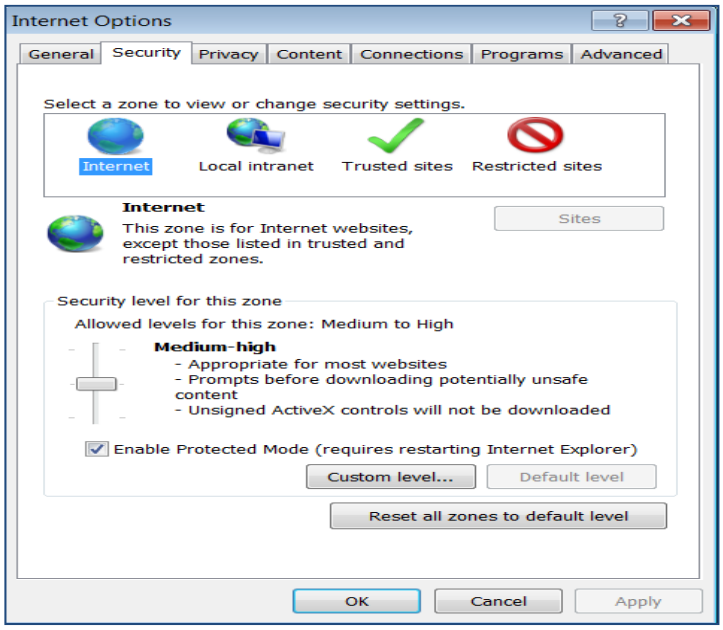
This example is for Internet Explorer web browser. For assistance with other browsers, contact your department information technology (IT) technician.

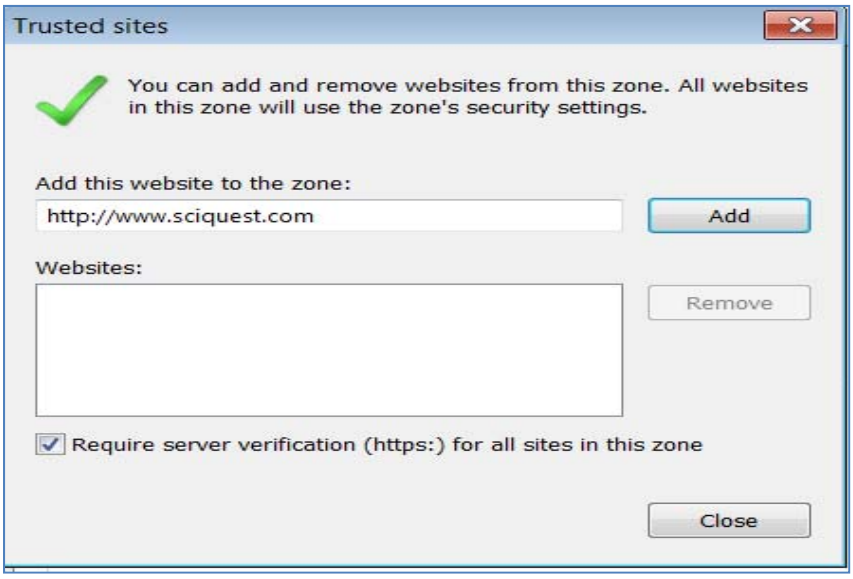
For all features to function fully in SciQuest, HokieMart users should make SciQuest a trusted site in their internet browser.

From the Browser Menu Bar:

Select Tools

- Internet Options
- Security
- Trusted Sites
- Sites




Trusted sites
You can add and remove websites from this zone. All websites in this zone will use the zone's security settings.
Add this website to the zone:
http://www.sciquest.com
Add
Websites:
Remove
Require server verification (https:) for all sites in this zone
Close

Enter **https://sciquest.com** in the field as shown.

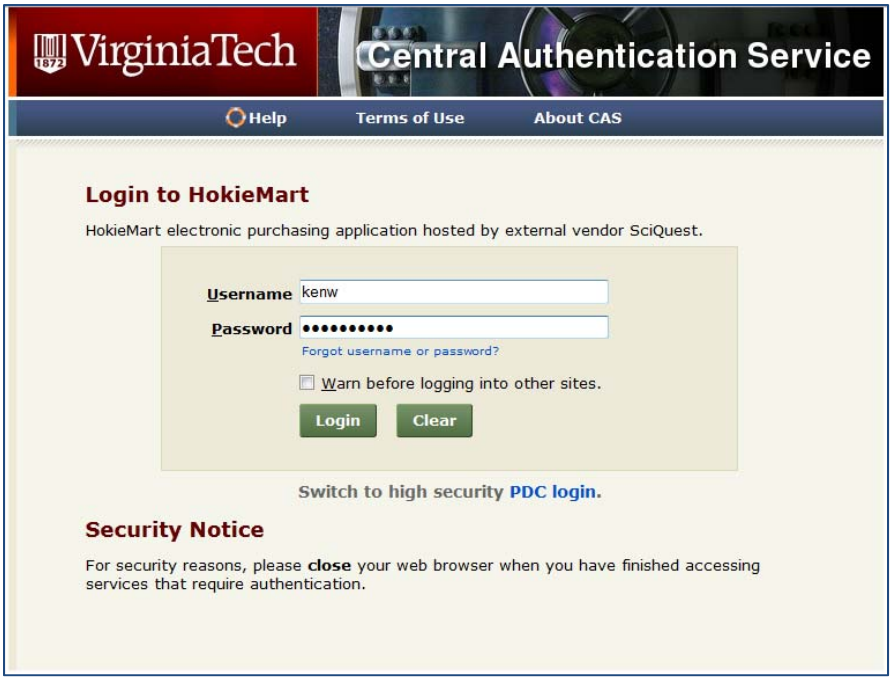
- Click “OK” to close the box.
- Click “OK” to close the Tools box.

Creating and Managing Your User Profile

Each HokieMart user has a "personalized" profile which must be created when access is granted. Some User Profile information is set up by the Controller's Office, when Permission Access is requested by the department. Other features must be set up by the User upon receiving access and prior to using HokieMart for the first time.

Production URL – **http://www.hokiemart.vt.edu**

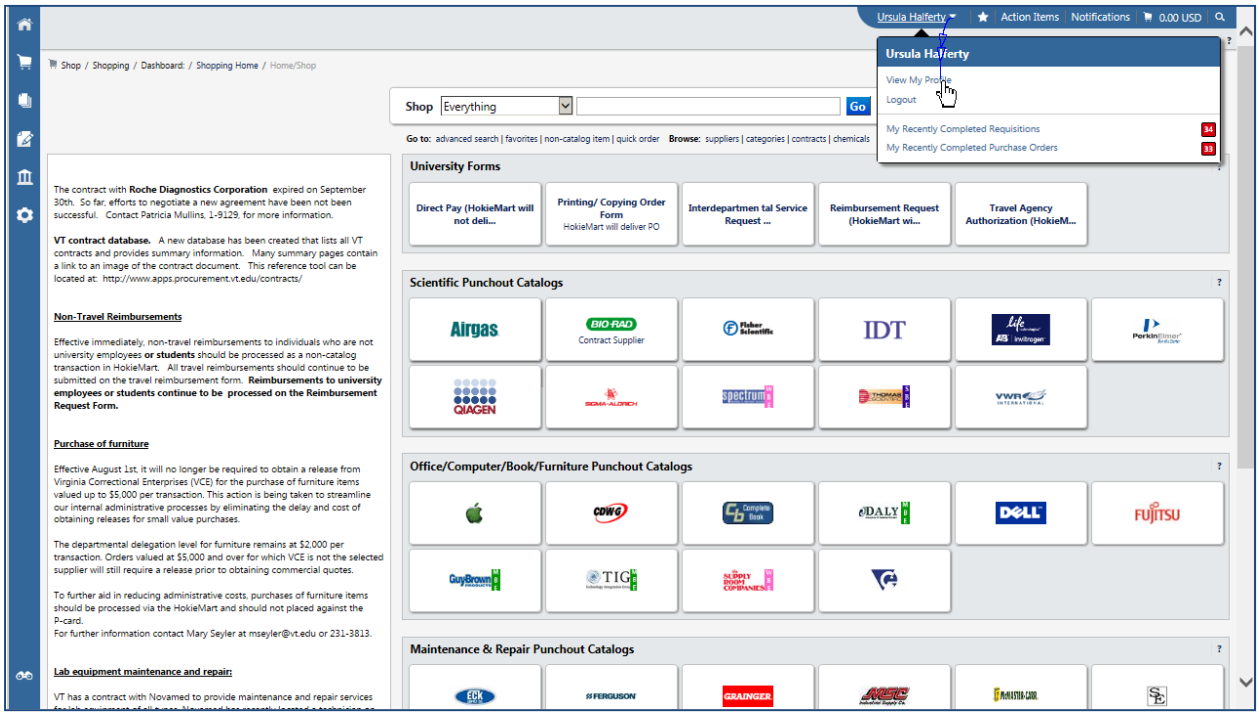
- Log into HokieMart:



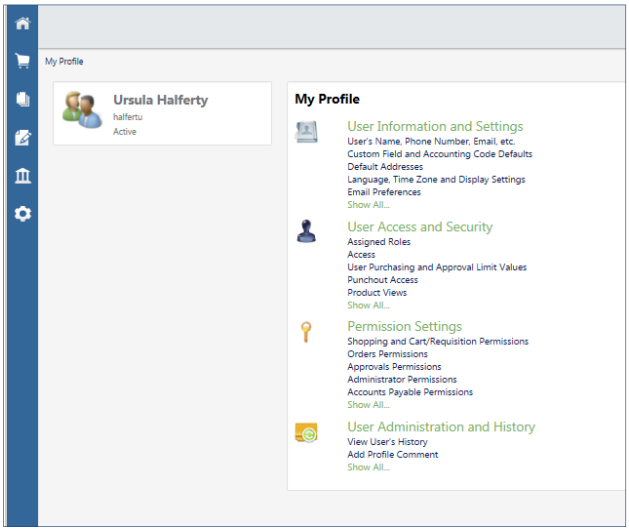
- Enter your PID (same username for Banner application)
- Enter your Password (same as password used to log into Hokie SPA, MyVT, or Banner leave system)
- Click "Login."

User Profile – How to Locate and Access User Profile Information

My Profile allows the user to view and manage personal information. In the new Phoenix Interface (PI), the slide-out Profile menu is located on the upper right side of the HokieMart Home page, **"View My Profile."**


Ursula Halferty
Action Items
Notifications
0.00 USD
Ursula Halferty
View My Profile
Logout
My Recently Completed Requisitions
My Recently Completed Purchase Orders
Shop / Shopping / Dashboard: / Shopping Home / Home/Shop
Shop
Everything
Go
Go to: advanced search | favorites | non-catalog item | quick order
Browse: suppliers | categories | contracts | chemicals
University Forms
Direct Pay (HokieMart will not deli...
Printing/ Copying Order Form
HokieMart will deliver PO
Interdepartmen tal Service Request ...
Reimbursement Request (HokieMart wi...
Travel Agency Authorization (HokieM...
Scientific Punchout Catalogs
Airgas
BIO-RAD
Contract Supplier
IDT
QIAGEN
Office/Computer/Book/Furniture Punchout Catalogs
DELL
FUJITSU
Maintenance & Repair Punchout Catalogs
FERGUSON
GRAINGER
The contract with Roche Diagnostics Corporation expired on September 30th. So far, efforts to negotiate a new agreement have been not been successful. Contact Patricia Mullins, 1-9129, for more information.
VT contract database. A new database has been created that lists all VT contracts and provides summary information. Many summary pages contain a link to an image of the contract document. This reference tool can be located at: http://www.apps.procurement.vt.edu/contracts/
Non-Travel Reimbursements
Effective immediately, non-travel reimbursements to individuals who are not university employees or students should be processed as a non-catalog transaction in HokieMart. All travel reimbursements should continue to be submitted on the travel reimbursement form. Reimbursements to university employees or students continue to be processed on the Reimbursement Request Form.
Purchase of furniture
Effective August 1st, it will no longer be required to obtain a release from Virginia Correctional Enterprises (VCE) for the purchase of furniture items valued up to $5,000 per transaction. This action is being taken to streamline our internal administrative processes by eliminating the delay and cost of obtaining releases for small value purchases.
The departmental delegation level for furniture remains at $2,000 per transaction. Orders valued at $5,000 and over for which VCE is not the selected supplier will still require a release prior to obtaining commercial quotes.
To further aid in reducing administrative costs, purchases of furniture items should be processed via the HokieMart and should not placed against the P-card.
For further information contact Mary Seyler at mseyler@vt.edu or 231-3813.
Lab equipment maintenance and repair:
VT has a contract with Novamed to provide maintenance and repair services

Click to bring up My Profile page. The main menu items are:

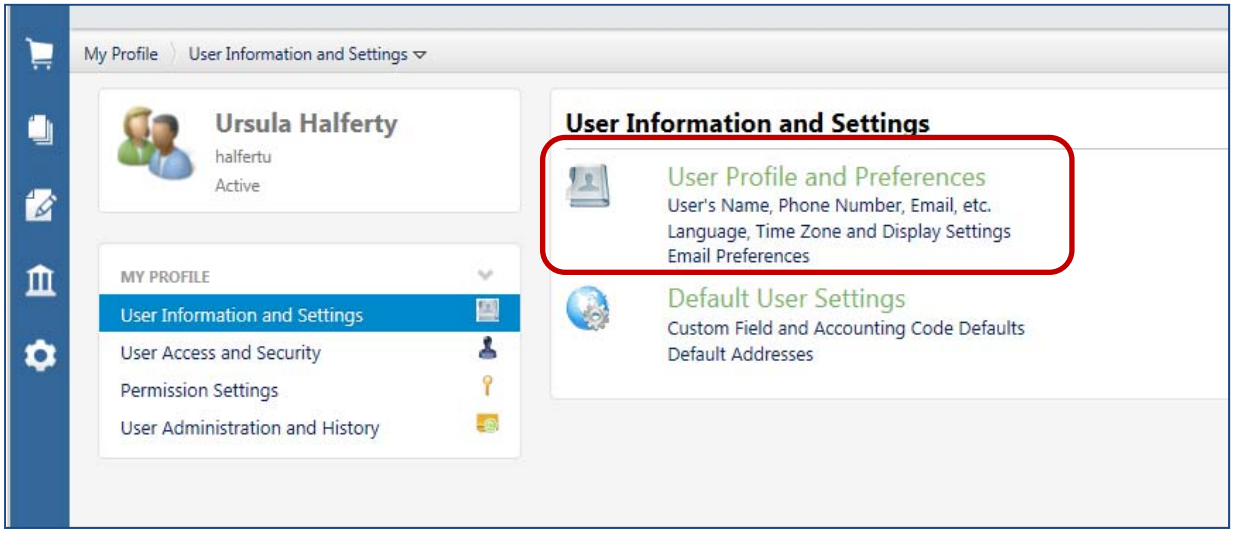


- User Information and Setting
- User Access and Security
- Permission Settings
- User Administration History

User Information and Setting

This information is stored when the user is created in HokieMart by the Controller's office. The user is unable to update the majority of this information. The information shown in this area of User Profile is provided primarily for the user's reference.

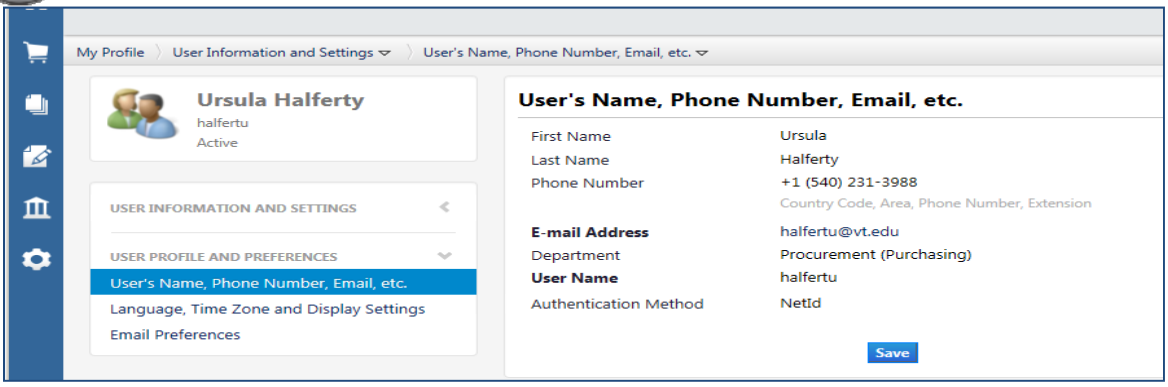
User Profile Preferences



User's Name, Phone Number, Email, Etc.

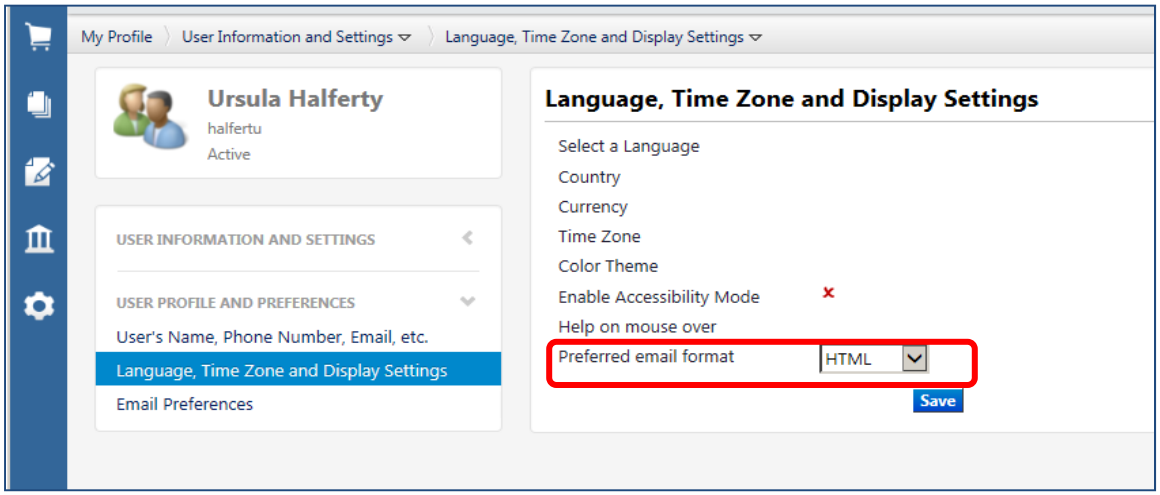
This sub menu allows users to view their name, phone number, E-mail, Department, and User Name.

If changes are needed, send an email to Penny Falck in the Controller's Office at plfalck@vt.edu.



Language, Time Zone and Display Settings

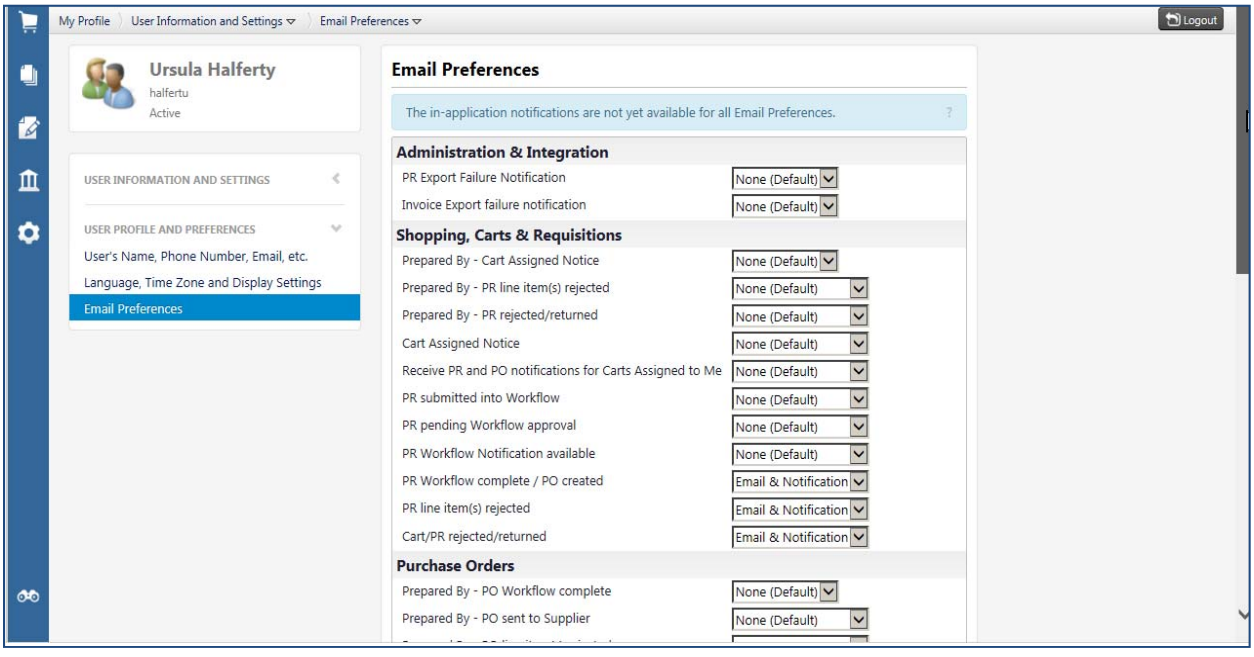
This information is stored when the user is created in HokieMart. The user is unable to update the majority of this information. Users may choose how email is delivered from a dropdown list; the options are either HTML or Plain text.



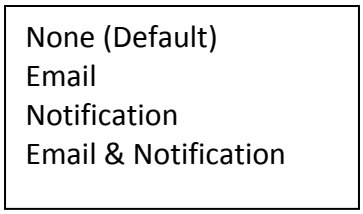
Email Preferences

When actions are performed in HokieMart, emails can be generated to notify users of these actions. We recommend users check these email notification boxes to increase the level of individual notification. By placing the cursor over the description, a brief definition will be displayed to assist users in making a decision.

- To access this page click the "Email Preferences" link located on the left side of the screen.


My Profile
User Information and Settings
Email Preferences
Logout
Ursula Halferty
halfertu
Active
USER INFORMATION AND SETTINGS
USER PROFILE AND PREFERENCES
User's Name, Phone Number, Email, etc.
Language, Time Zone and Display Settings
Email Preferences
Email Preferences
The in-application notifications are not yet available for all Email Preferences.
Administration & Integration
PR Export Failure Notification
Invoice Export failure notification
Shopping, Carts & Requisitions
Prepared By - Cart Assigned Notice
Prepared By - PR line item(s) rejected
Prepared By - PR rejected/returned
Cart Assigned Notice
Receive PR and PO notifications for Carts Assigned to Me
PR submitted into Workflow
PR pending Workflow approval
PR Workflow Notification available
PR Workflow complete / PO created
PR line item(s) rejected
Cart/PR rejected/returned
Purchase Orders
Prepared By - PO Workflow complete
Prepared By - PO sent to Supplier
None (Default)
Email & Notification

- Click on the drop down menu icon to update any or all of the Email Preference options. Most Email Preference options provide the following choices:



  - **None (Default)** – no notifications are delivered by the system
  - **Email** - will send an email to your email address
  - **Notification** – will add a notification to the Notifications Menu on the top of the HokieMart page.
  - **Email & Notification** – will do both listed above.

- Please note that selecting all notification can be cumbersome.
- Some notifications, which were previously available in the HokieMart Classic Interface, are no longer available in the new Phoenix Interface.

Tip:

The Procurement Department recommends user select at minimum these eight (8) options:

- Related to Purchase Requisitions (PR's):
  - PR Workflow complete/PO created
  - PR line items rejected
  - Cart/PR rejected/returned

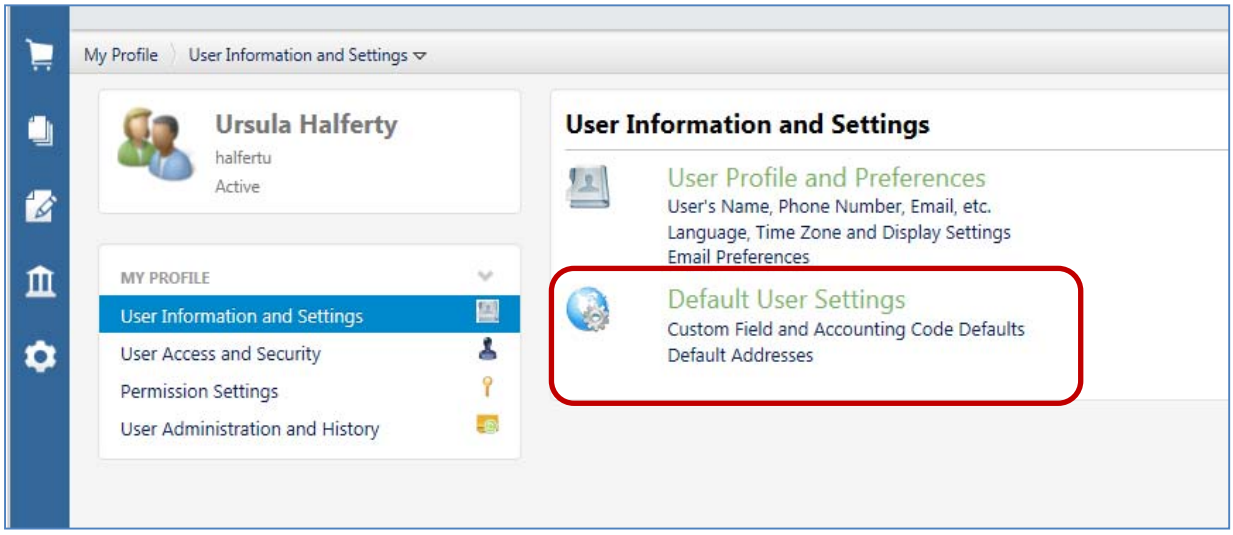
- Related to Purchase Orders (PO's)
  - PO Workflow Notification Available
  - PO Workflow Complete
  - PO Line item(s) rejected
  - PO Rejected

- Settlement
  - Invoice Line Item(s) Rejected

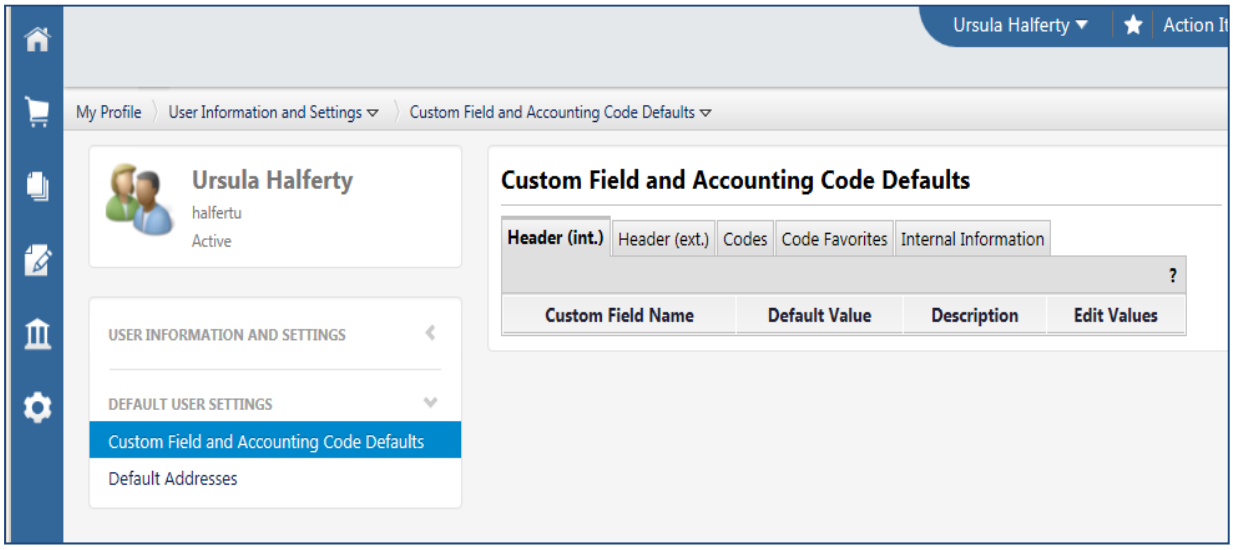
Default User Setting

Custom Fields and Accounting Code Defaults

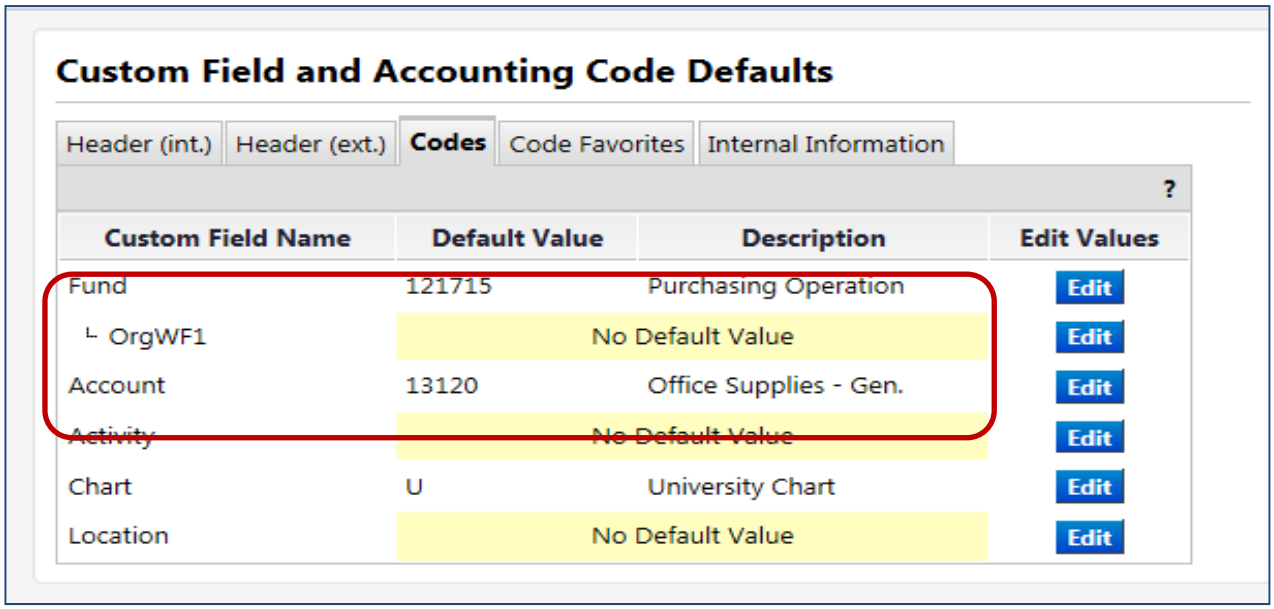
The Custom Fields Menu provides access to other individual menus allowing users to store specific data associated with their profile.



Custom Field and Accounting Codes Defaults



Users have the ability to store values in various fields under these tab settings. In this section the two tabs areas that are the most useful to users are CODE and CODE Favorites.



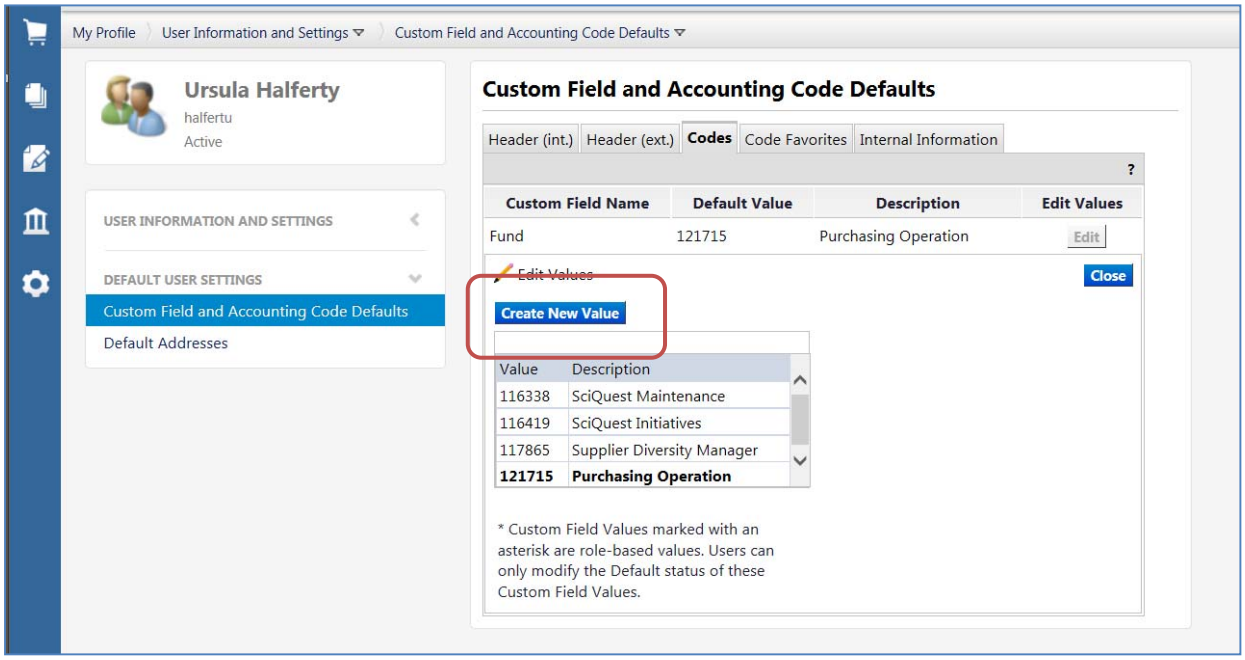
Under the Codes tab each field has "Edit" is available. New HokieMart users, user who change departments within the university or users who have access to new or additional funds are required to EDIT or change the information in this area. The only required fields when creating and processing a Purchase Requisition are **Fund** and **Account**. All HokieMart users must enter at least one **Fund** and **Account** combination. The department information, known as Organization (Org) information, will populate automatically when the fund number is entered in

the field. The system will only let the user enter fund information that has been authorized by the Controller's office.

Adding Fund Information To User Profile

Some users may have access to only one fund, whereas other users may have access to many funds. As funds are selected by the user, they will appear in a list in the middle of the screen. If a default fund is selected, it will appear in **BOLD** type as shown below.

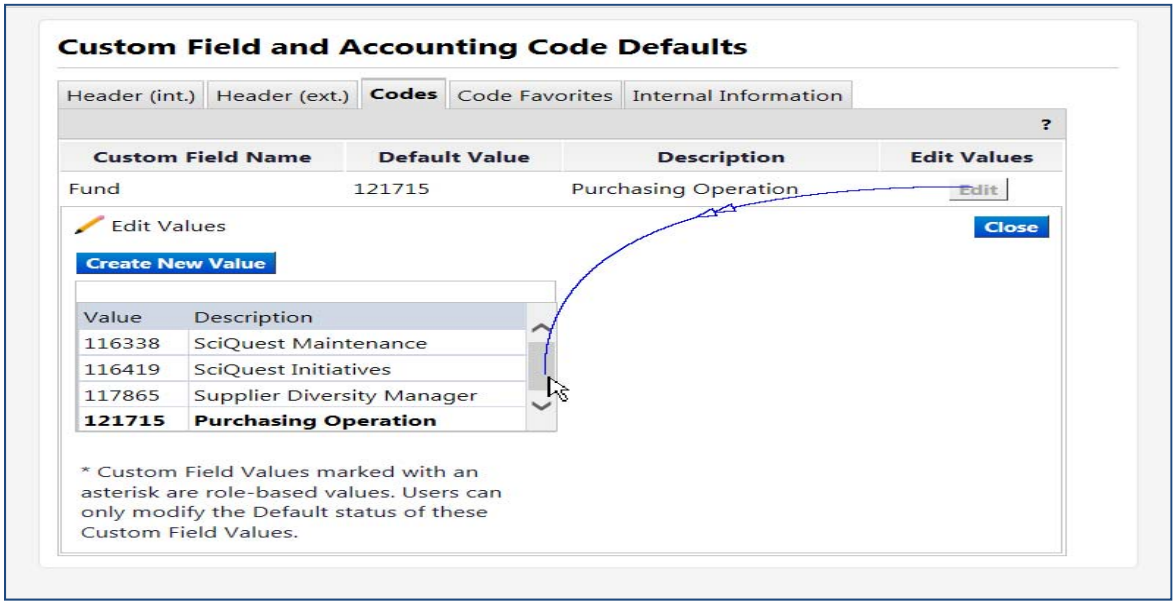
- Select "Edit" under the "Edit Values" column on the far right on the Custom Field and Accounting code Defaults.
- On the screen seen below click "Create New Value."



- In the description field, enter the name of the department, as identified in Banner.
- Click "Search."

A list of available funds for the department will appear.

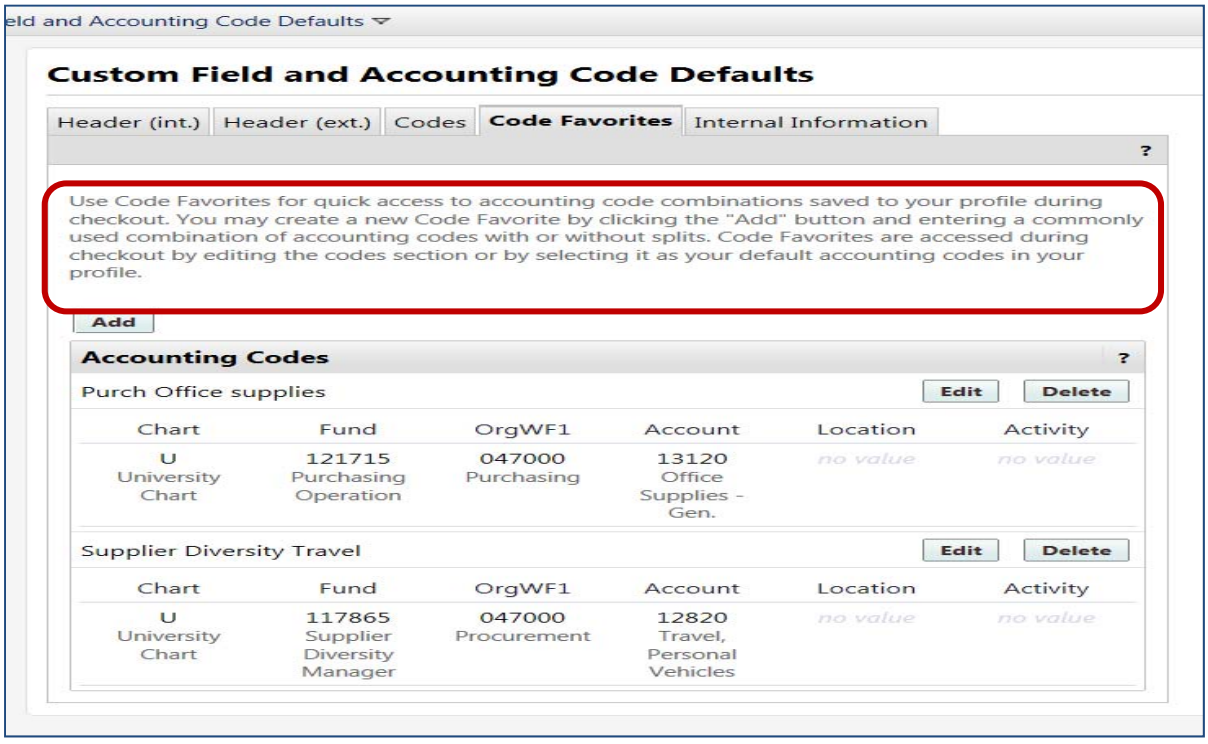
- Place a check mark in the "Select" box.
- Click "Add Values." The fund number will be added to your listing.



Hint:

Users may add additional funds as necessary, but **users may have only one default fund**.

Account Code Favorites



**Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

As accounts are selected by the user, they will appear in a list on the screen. **It is recommended that default account codes not be created.** Users should verify the account code at the time the requisition is being prepared.

For a list of **Frequently Used Account Codes** see page 147.

Accounting Code Favorites allows a user to create a name for a saved combination of fund and account (and activity code if applicable).

- Enter the nickname for the new favorite being created.
- Enter the codes for the favorite such as fund code, account code, and activity code if applicable.
- Click the save button when complete.

When entering funding in a cart, the favorite can be used. Select the favorite code from the list as indicated below which will default the saved values such as fund code, account code, and activity code.

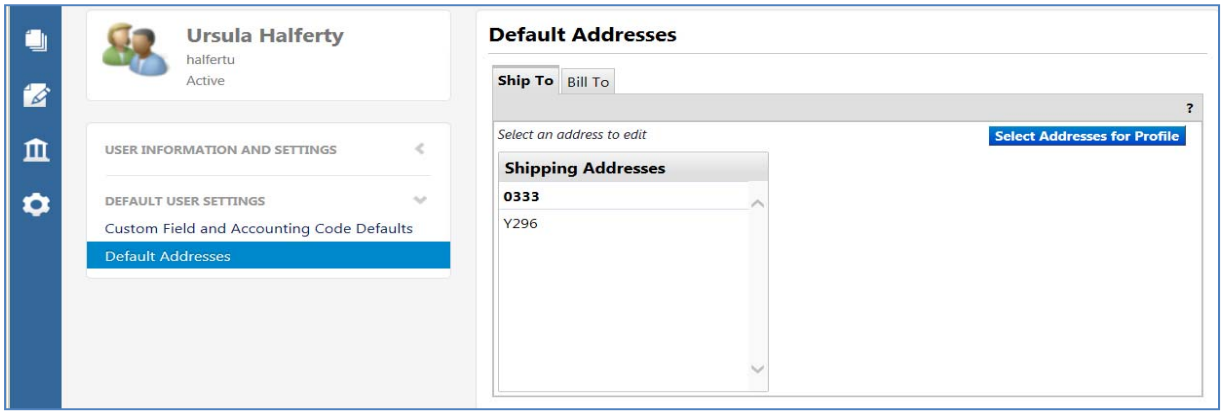
This process should be very helpful when splitting the same funds and account codes on a regular basis.

Addresses

Default Addresses

The user's default address information should be populated prior to using HokieMart. The most recent university wide update of all addresses occurred July 2013. The "Ship To" addresses in HokieMart are the current addresses in Banner. The only acceptable "Ship To" addresses allowed in HokieMart are official addresses previously determined by the university.

The addresses available are: "Ship To" and "Bill To."



If there is a question about a department change of address, please notify hokiemart@vt.edu.

The addresses may be viewed by selecting:

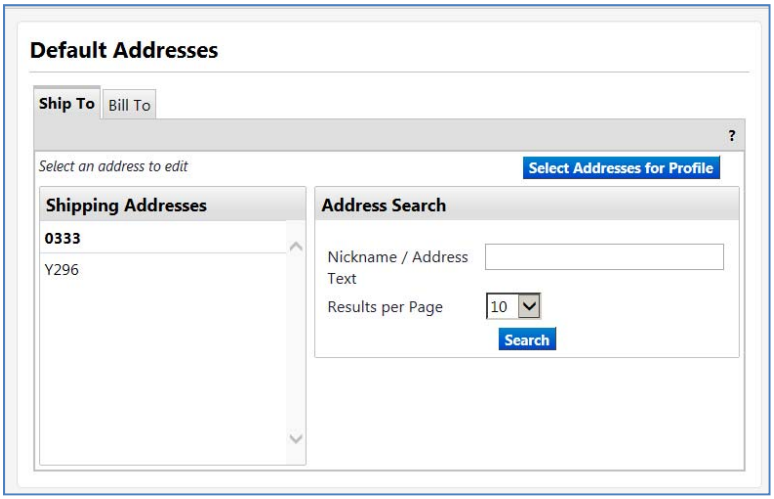
- Default Addresses
  - "Ship To" tab or
  - "Bill To" tab

Ship To

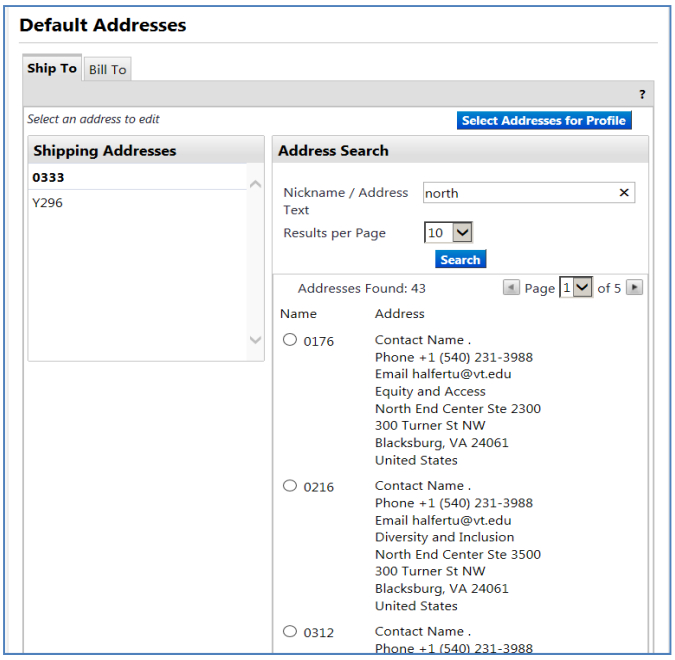
The "Ship To" address will be the address users would like the item(s) delivered. Some departments have just one "ship to" address that is used daily. For some departments, addresses will vary. For this reason, users will have the ability to select multiple "Ship To" addresses.

To create a "Ship To" address in HokieMart, users are able to search all available addresses.

- Click "Select Addresses for Profile." *Users may find it easier to enter their department name or building name in the "Address Text" field.*

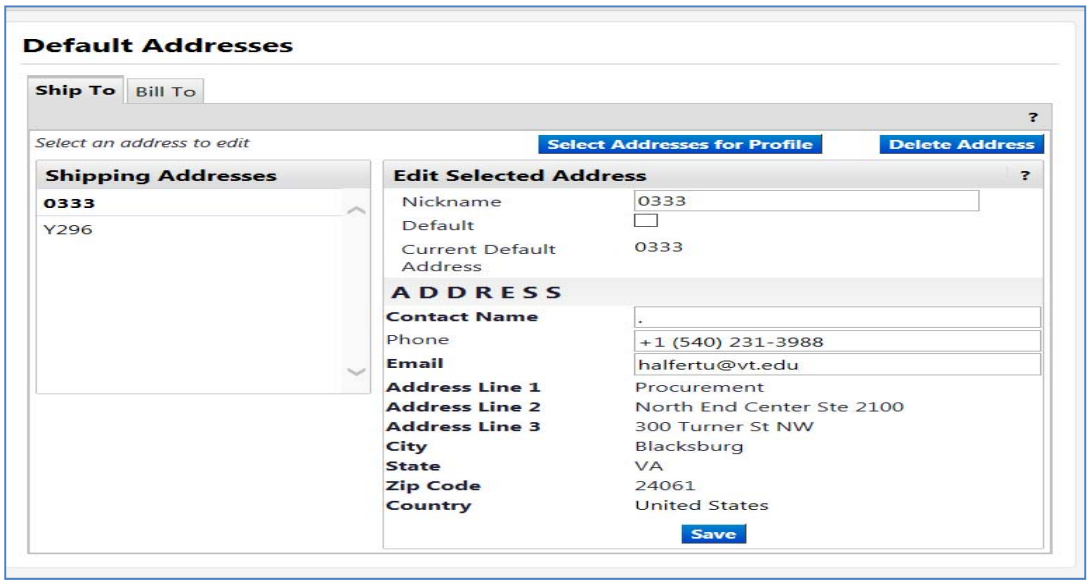


- Select "Search." Type in a key word(s) from the address you are searching. The text field is not case sensitive. The address information will then be displayed. Depending on information entered, the listing may be long.



Name	Address
0176	Contact Name . Phone +1 (540) 231-3988 Email halfertu@vt.edu Equity and Access North End Center Ste 2300 300 Turner St NW Blacksburg, VA 24061 United States
0216	Contact Name . Phone +1 (540) 231-3988 Email halfertu@vt.edu Diversity and Inclusion North End Center Ste 3500 300 Turner St NW Blacksburg, VA 24061 United States
0312	Contact Name . Phone +1 (540) 231-3988 Email halfertu@vt.edu Controller North End Center Ste 3300 300 Turner St NW Blacksburg, VA 24061 United States
0333	Contact Name . Phone +1 (540) 231-3988 Email halfertu@vt.edu Procurement

To add this address to your Profile:



- Place the cursor in the “radio” button and click. The address will be displayed.
- The users name field will default to “.”. Type users name in **Contact Name** field. So that this will display on Purchase Requisitions (PR’s).
- Click “Save.”

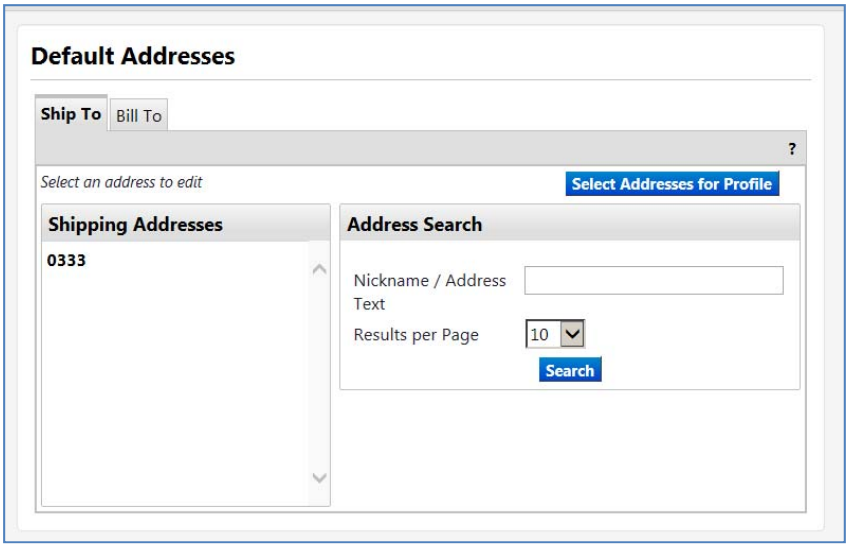
If only one address is needed, it will appear as the default. If additional addresses are necessary, users have the ability to select a particular address as their default.

Users have the ability to select multiple “Ship To” addresses based on their needs and the needs of their department.

To select additional addresses:

- Click “Select Addresses for Profile.”

- Follow the above steps for adding address information.



The query box will display. The steps are the same as outlined above.

User has now added multiple addresses in the “Ship To” section. This address will appear as an option in the drop-down menu of the “Ship To” address. When adding multiple addresses, if users select a default address, it will be in **BOLD** type.

About addresses:

- We suggest that the “Nick Name” option **not** be used.
- The default code should not be changed.

How to Update a Ship To / Invoice To Address

If changes need to be made, a form is provided by the Procurement Department for these changes. Visit the: **http://www.procurement.vt.edu/HokieMart/forms.html** to download the form. Send to Mail Code 0333 or pdf the form the hokiemart@vt.edu.

Sample

Ship To / Invoice To Address Request Form

Date _____

Requestor Name _____

Email Address _____

Phone number _____

Fill out the section below that pertains to your request

Request for New Code to be Added

1st Address Line _____

2nd Address Line _____

3rd Address Line _____

City State Zip _____

Current Virginia Tech Mail Code at this location _____

Change Request for Current Code

Current Ship To / Invoice To Code Number _____

Fill in changes you need to be made below

1st Address Line _____

2nd Address Line _____

3rd Address Line _____

City State Zip _____

Purchasing Use Only

____ Your new address was added and the new code is _____

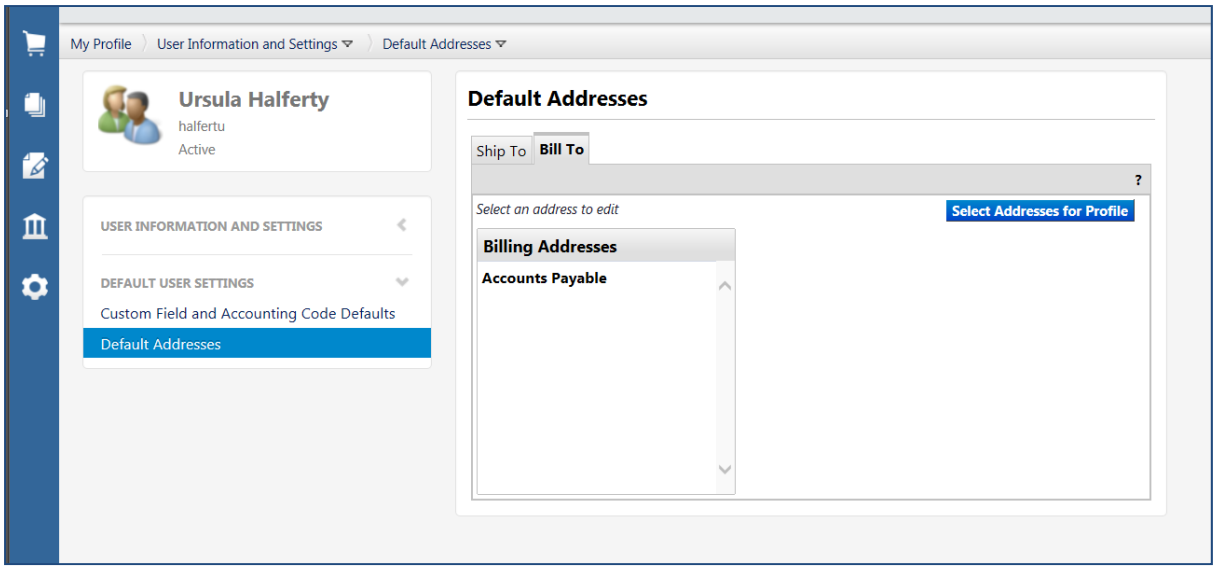
____ Your current address has been updated and is ready to use

____ Your request could not be processed. Please see attached email for specific reasons.

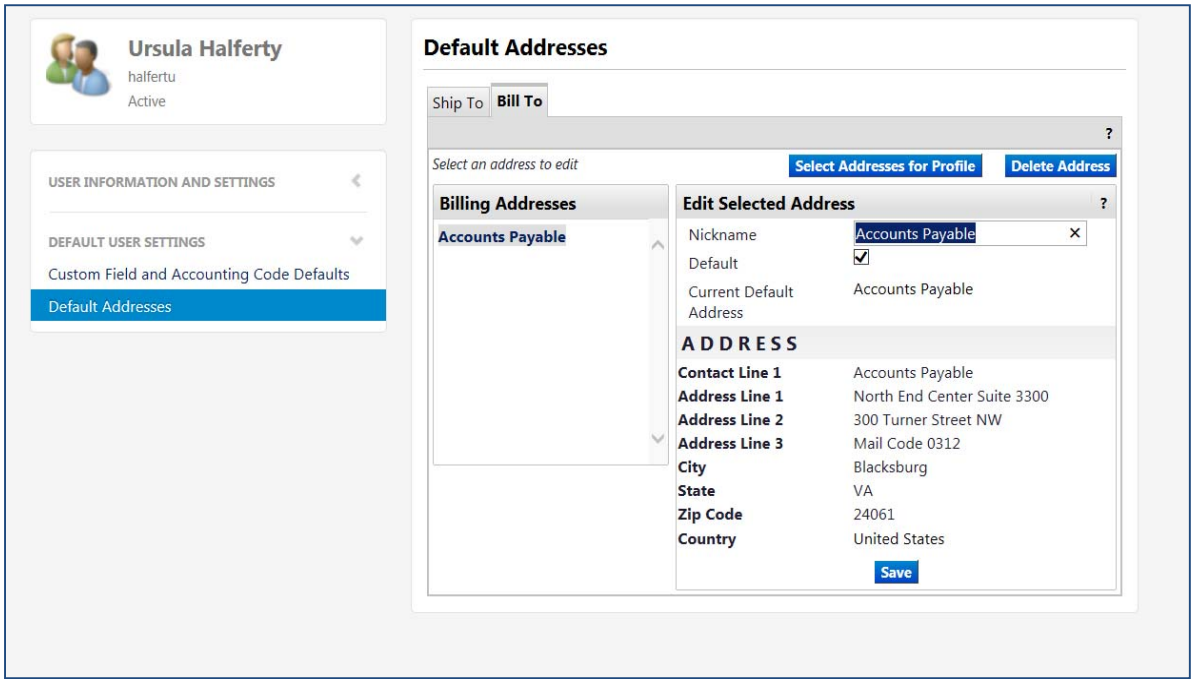
created 05-17-06

Bill To

With central invoicing required in HokieMart, invoices will be received **only** by the Controller's Office. Departments should not receive invoices. The "Bill To" address may be viewed by selecting:



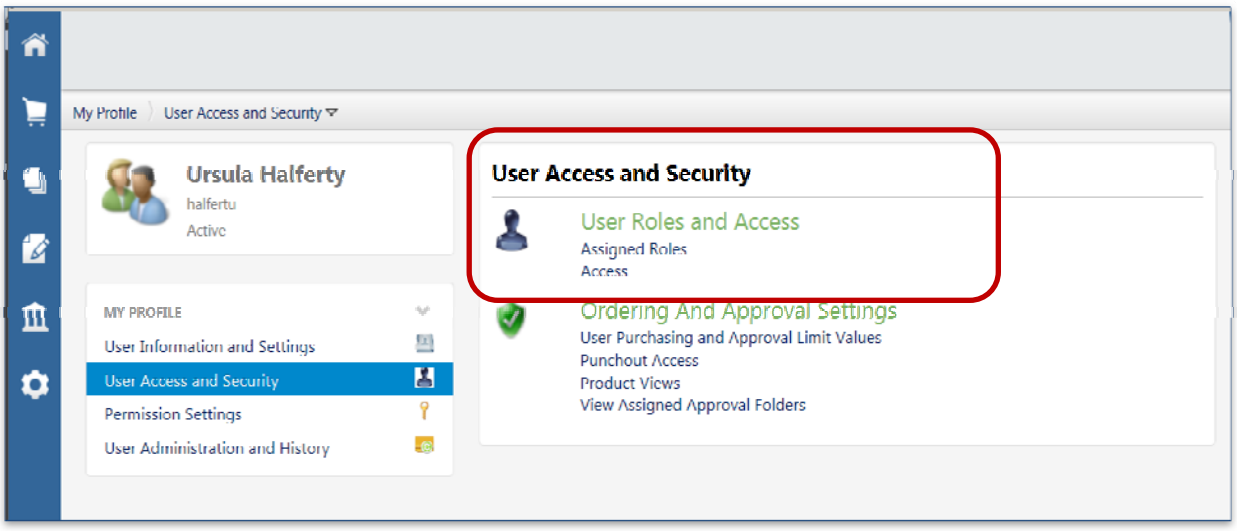
- Click "Select Addresses for Profile."



Accounts Payable is the only address which can be chosen and will always be the default.

- Click "Save"

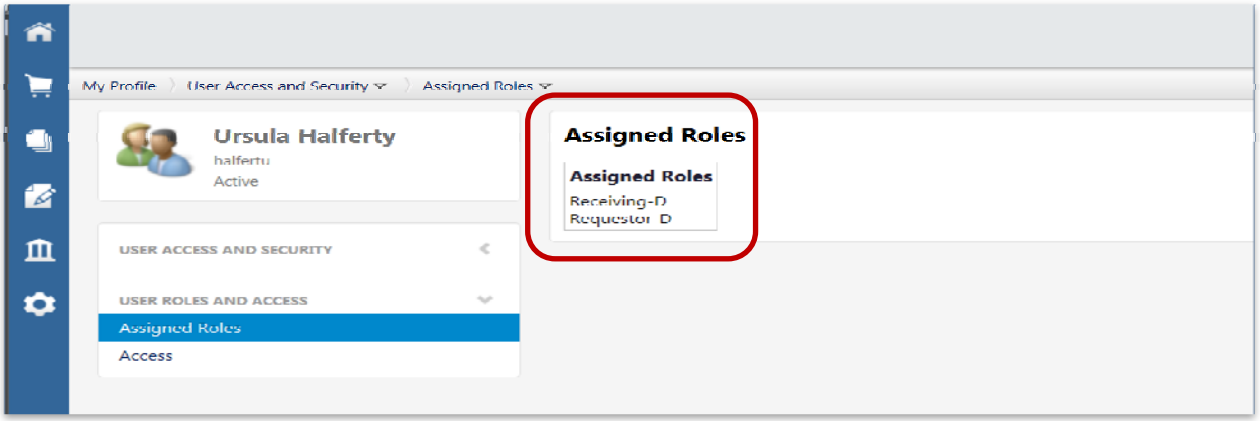
User Access and Security



Assigned Roles

Roles are assigned to a particular user based on information received from departments and levels of responsibilities within individual departments and are controlled within the HokieMart application. (*For more information on roles see: Overview: Roles*).

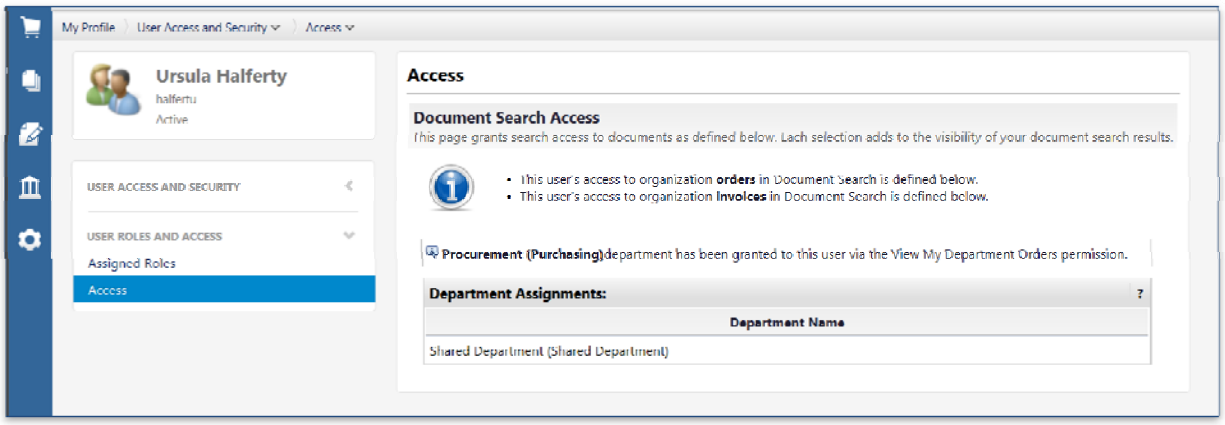
To view your assigned role(s):



- Click on "Assigned Roles" under the "User Roles and Access" option.

- If roles need to be changed or updated, complete the HokieMart Departmental Functions form found at: **http://www.procurement.vt.edu/HokieMart/forms.html**.
  - After completing the form, mail the form to Penny Falck in the Controller's Office (0312)

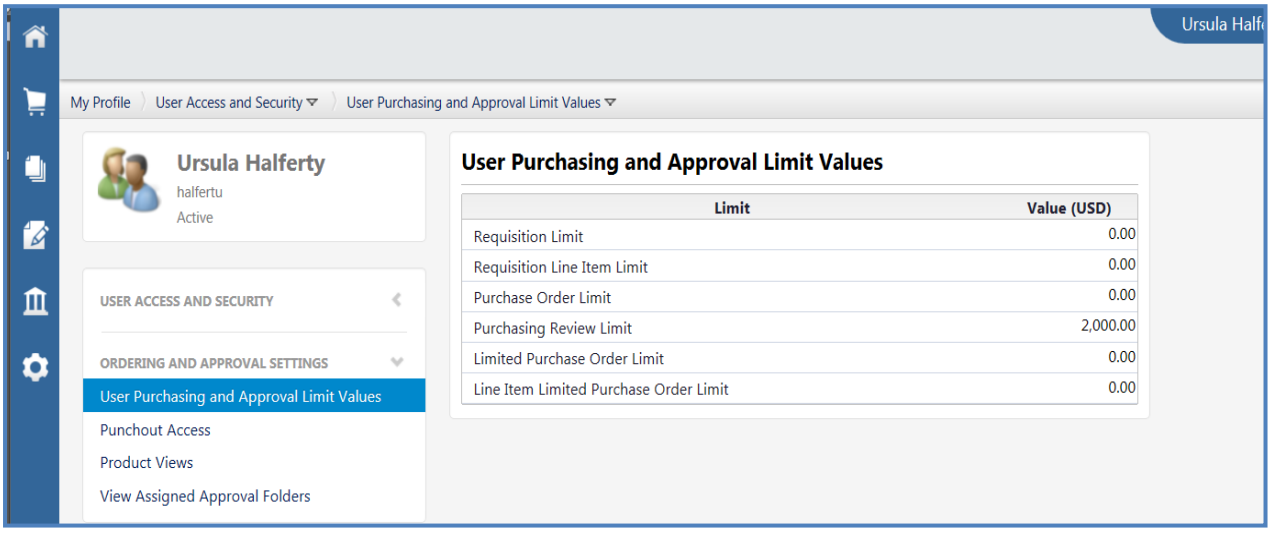
Access


My Profile
User Access and Security
Access
Ursula Halferty
halfertu
Active
USER ACCESS AND SECURITY
USER ROLES AND ACCESS
Assigned Roles
Access
Access
Document Search Access
This page grants search access to documents as defined below. Each selection adds to the visibility of your document search results.
This user's access to organization orders in Document Search is defined below.
This user's access to organization Invoices in Document Search is defined below.
Procurement (Purchasing) department has been granted to this user via the View My Department Orders permission.
Department Assignments:
Department Name
Shared Department (Shared Department)

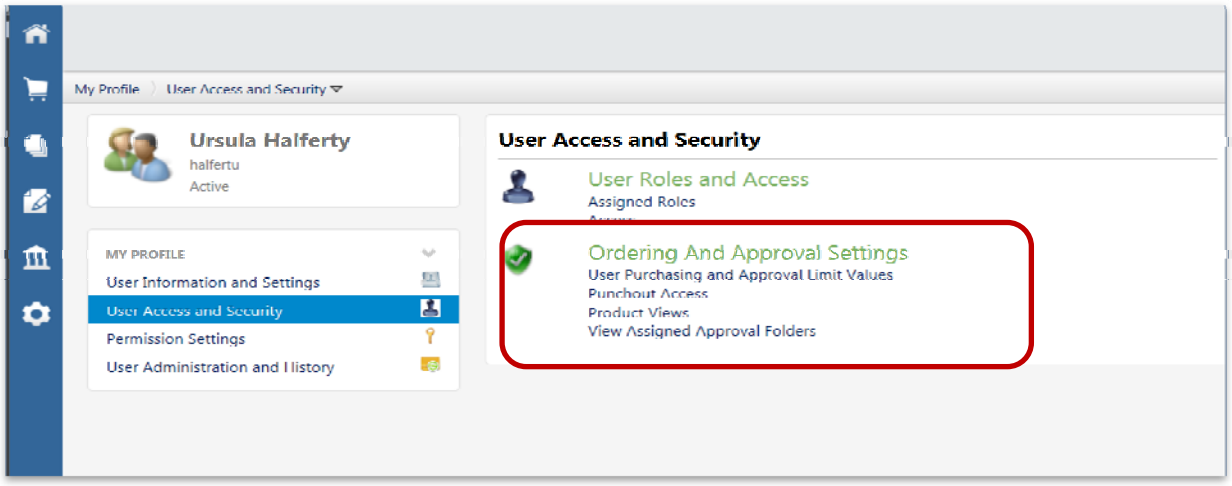
The Document Search Access page displays the level of visibility the user has been granted when conducting a document search.

User Purchasing and Approval Limit Values

This area allows a user to view the purchasing and approval limit values assigned.



Ordering and Approvals Settings

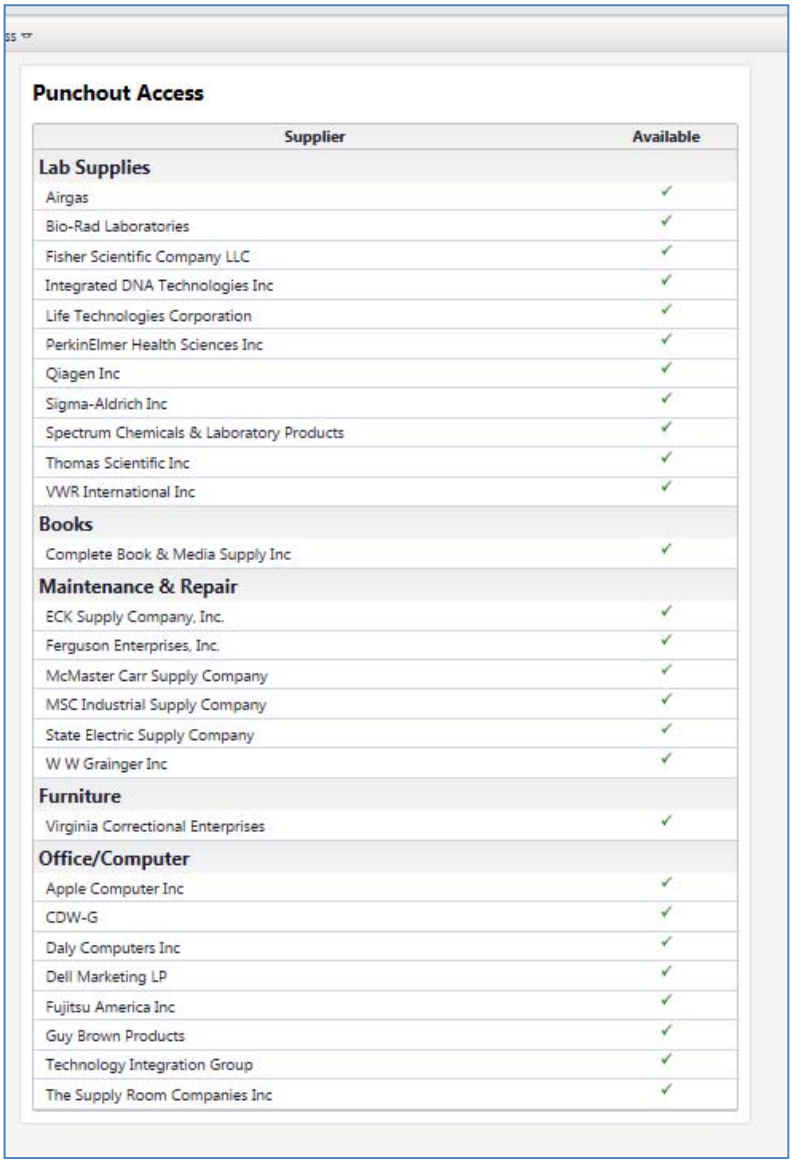


Punchout Access

In HokieMart there is a purchasing option titled "Punchout." Punchout's are discussed in greater detail in later in this guide.

Click on the "Punchout Access" link. Users will be able to view the Punchout vendors that are accessible in the HokieMart e-procurement system. Virginia Tech has granted all users available access to all vendor. Available will be the default to all users.

The information on this screen will change as Punchout suppliers are added or removed.

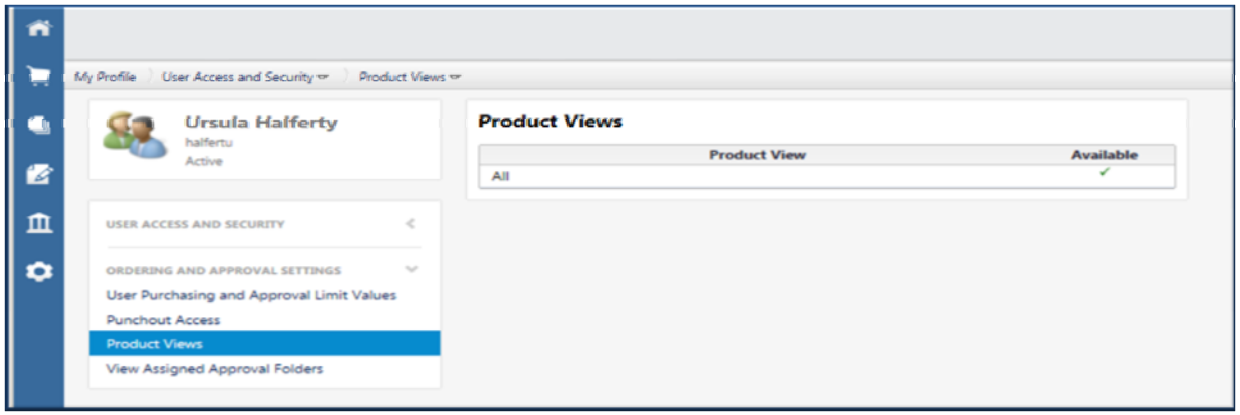


Punchout Access

Supplier	Available
Lab Supplies	
Airgas	✓
Bio-Rad Laboratories	✓
Fisher Scientific Company LLC	✓
Integrated DNA Technologies Inc	✓
Life Technologies Corporation	✓
PerkinElmer Health Sciences Inc	✓
Qiagen Inc	✓
Sigma-Aldrich Inc	✓
Spectrum Chemicals & Laboratory Products	✓
Thomas Scientific Inc	✓
VWR International Inc	✓
Books	
Complete Book & Media Supply Inc	✓
Maintenance & Repair	
ECK Supply Company, Inc.	✓
Ferguson Enterprises, Inc.	✓
McMaster Carr Supply Company	✓
MSC Industrial Supply Company	✓
State Electric Supply Company	✓
W W Grainger Inc	✓
Furniture	
Virginia Correctional Enterprises	✓
Office/Computer	
Apple Computer Inc	✓
CDW-G	✓
Daly Computers Inc	✓
Dell Marketing LP	✓
Fujitsu America Inc	✓
Guy Brown Products	✓
Technology Integration Group	✓
The Supply Room Companies Inc	✓

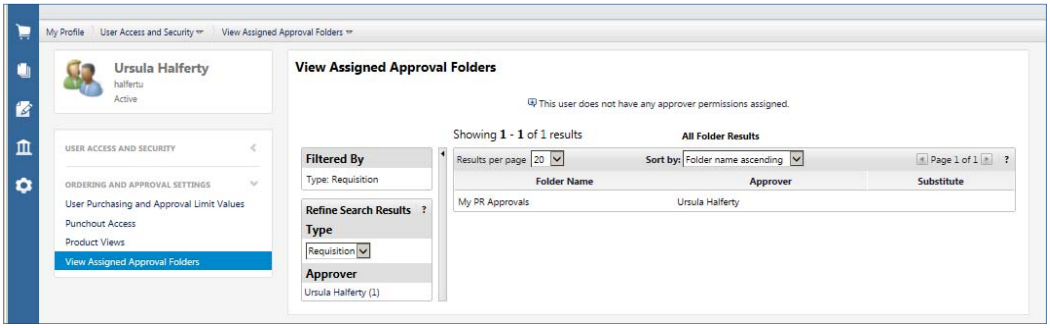
Product Views

This will display a listing of the types of products that users may view. There may be instances where a user has "limits" assigned to the types of products that are available to view in HokieMart. The default is "All."

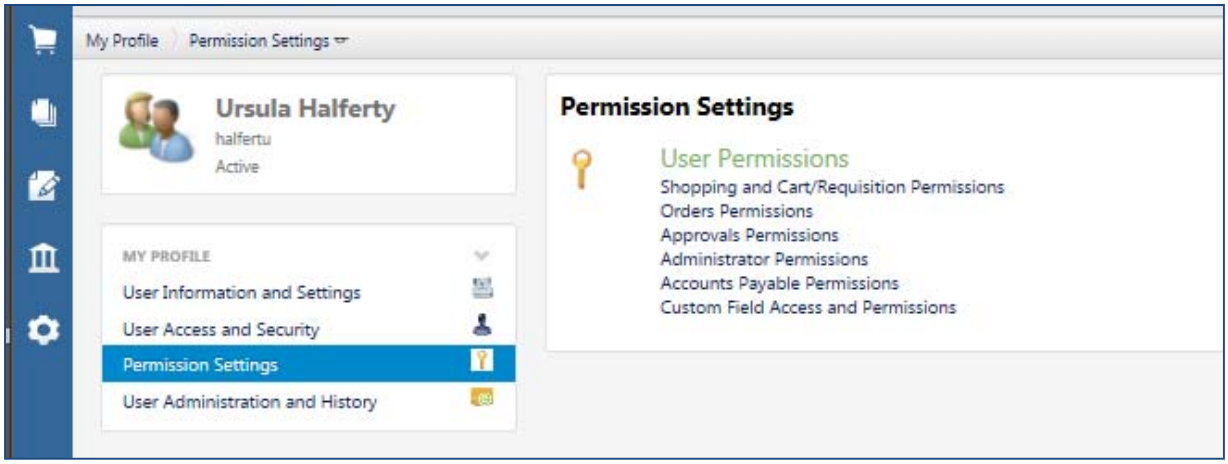


View Assigned Approval Folders

This area allows users/ requestors to see the PR Approvals they have access to view. For example if the person looking at their profile is a supervisor, this area may include access to view multiple users.



Permission Settings

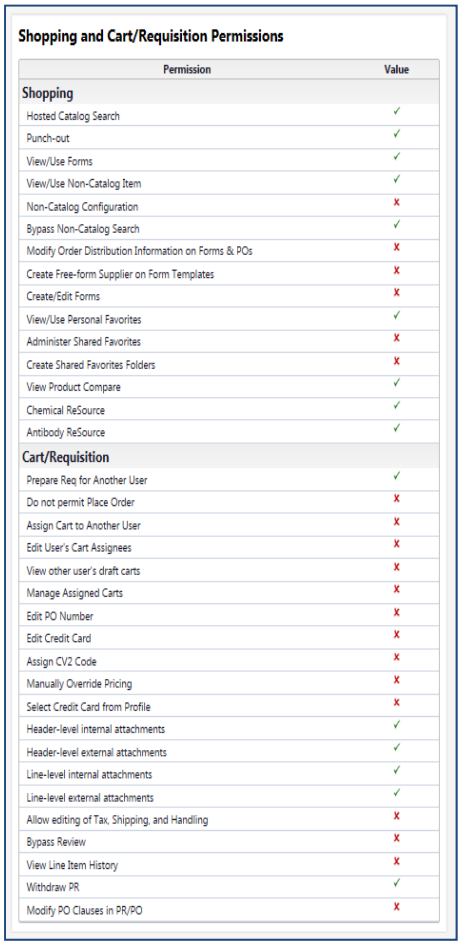


Each user is granted various permissions within HokieMart. These permissions are based on the level of responsibility of the user. In this area of the user profile various permissions options in HokieMart can be viewed.

Users may view these when they enter HokieMart for the first time. If any of the information or permissions is incorrect, please contact your department administrator.

These permissions will not be explained in detail, but are provided for reference purposes only.

Shopping and Cart / Requisition Permissions



Shopping and Cart/Requisition Permissions

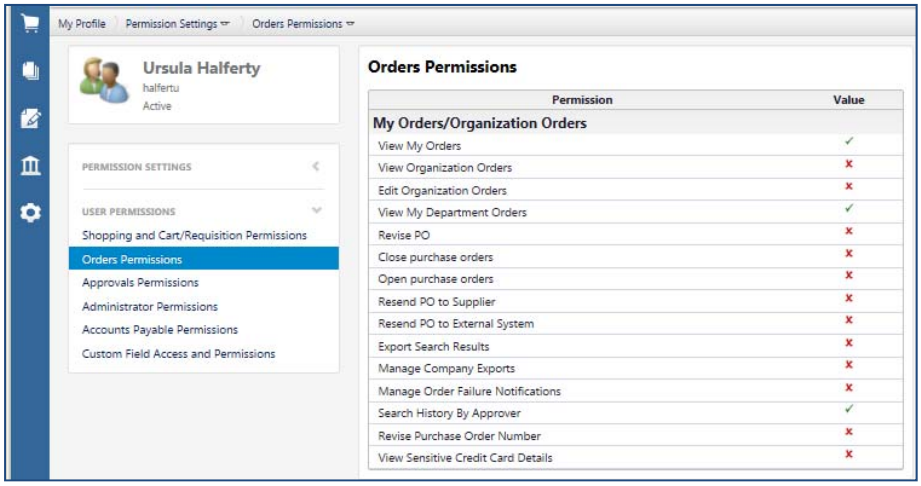
Permission	Value
Shopping	
Hosted Catalog Search	✓
Punch-out	✓
View/Use Forms	✓
View/Use Non-Catalog Item	✓
Non-Catalog Configuration	x
Bypass Non-Catalog Search	✓
Modify Order Distribution Information on Forms & POs	x
Create Free-form Supplier on Form Templates	x
Create/Edit Forms	x
View/Use Personal Favorites	✓
Administer Shared Favorites	x
Create Shared Favorites Folders	x
View Product Compare	✓
Chemical ReSource	✓
Antibody ReSource	✓
Cart/Requisition	
Prepare Req for Another User	✓
Do not permit Place Order	x
Assign Cart to Another User	x
Edit User's Cart Assignees	x
View other user's draft carts	x
Manage Assigned Carts	x
Edit PO Number	x
Edit Credit Card	x
Assign CV2 Code	x
Manually Override Pricing	x
Select Credit Card from Profile	x
Header-level internal attachments	✓
Header-level external attachments	✓
Line-level internal attachments	✓
Line-level external attachments	✓
Allow editing of Tax, Shipping, and Handling	x
Bypass Review	x
View Line Item History	x
Withdraw PR	✓
Modify PO Clauses in PR/PO	x

Displayed is an example of the information that may be viewed.

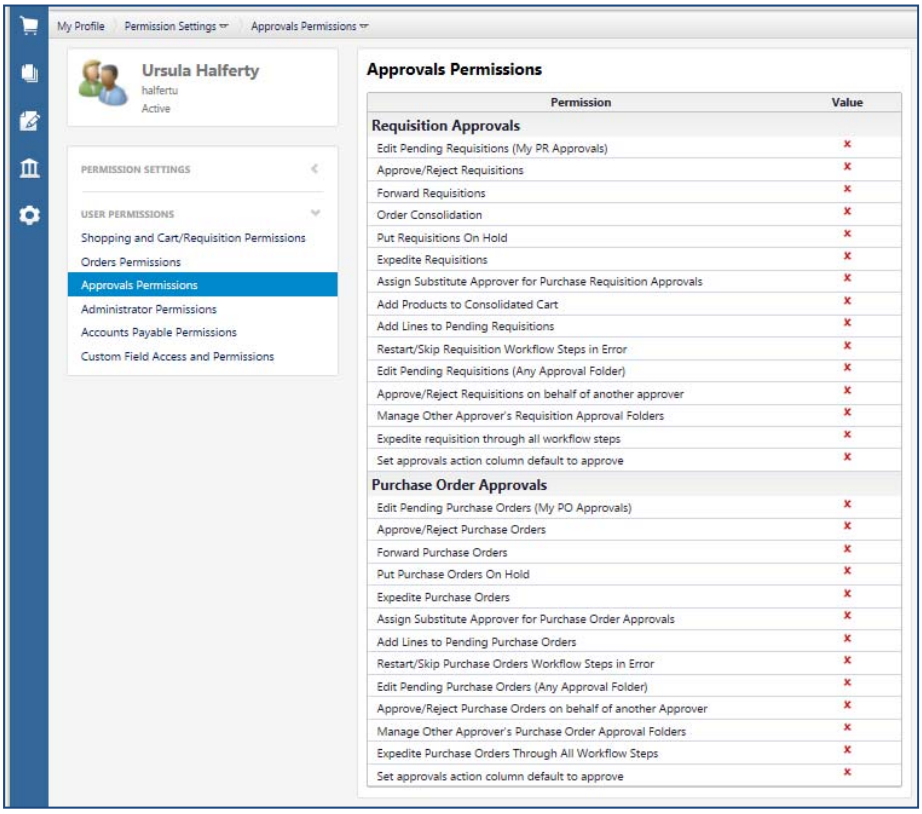
If permission is granted, a check mark will appear in the value field.

If permission is not granted, an X will appear.

Orders Permissions

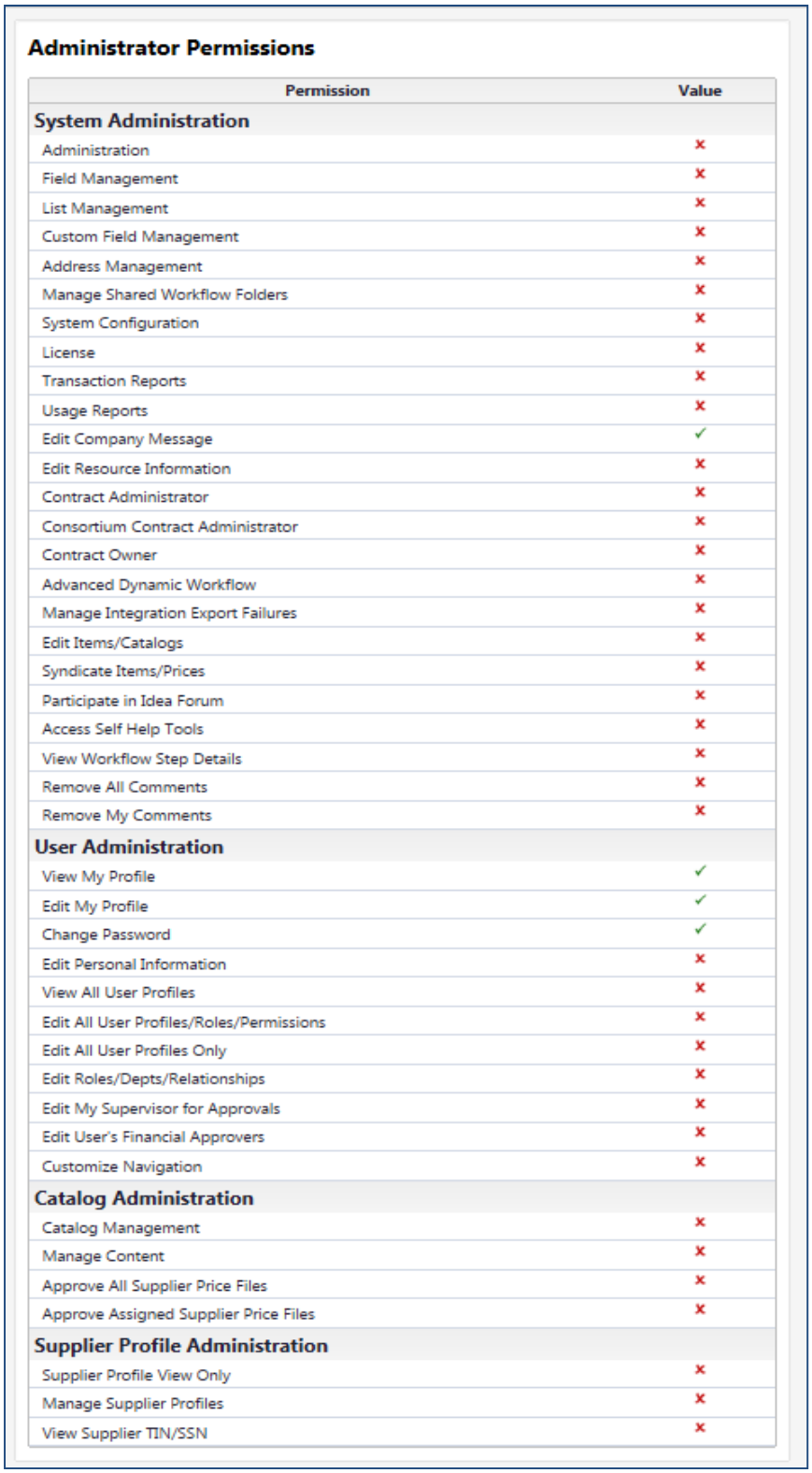


Approvals Permission


My Profile
Permission Settings
Approvals Permissions
Ursula Halferty
halfertu
Active
PERMISSION SETTINGS
USER PERMISSIONS
Shopping and Cart/Requisition Permissions
Orders Permissions
Approvals Permissions
Administrator Permissions
Accounts Payable Permissions
Custom Field Access and Permissions
Approvals Permissions
Permission
Value
Requisition Approvals
Edit Pending Requisitions (My PR Approvals)
Approve/Reject Requisitions
Forward Requisitions
Order Consolidation
Put Requisitions On Hold
Expedite Requisitions
Assign Substitute Approver for Purchase Requisition Approvals
Add Products to Consolidated Cart
Add Lines to Pending Requisitions
Restart/Skip Requisition Workflow Steps in Error
Edit Pending Requisitions (Any Approval Folder)
Approve/Reject Requisitions on behalf of another approver
Manage Other Approver's Requisition Approval Folders
Expedite requisition through all workflow steps
Set approvals action column default to approve
Purchase Order Approvals
Edit Pending Purchase Orders (My PO Approvals)
Approve/Reject Purchase Orders
Forward Purchase Orders
Put Purchase Orders On Hold
Expedite Purchase Orders
Assign Substitute Approver for Purchase Order Approvals
Add Lines to Pending Purchase Orders
Restart/Skip Purchase Orders Workflow Steps in Error
Edit Pending Purchase Orders (Any Approval Folder)
Approve/Reject Purchase Orders on behalf of another Approver
Manage Other Approver's Purchase Order Approval Folders
Expedite Purchase Orders Through All Workflow Steps
Set approvals action column default to approve

Administrator Permissions

View various Administrator Permissions.

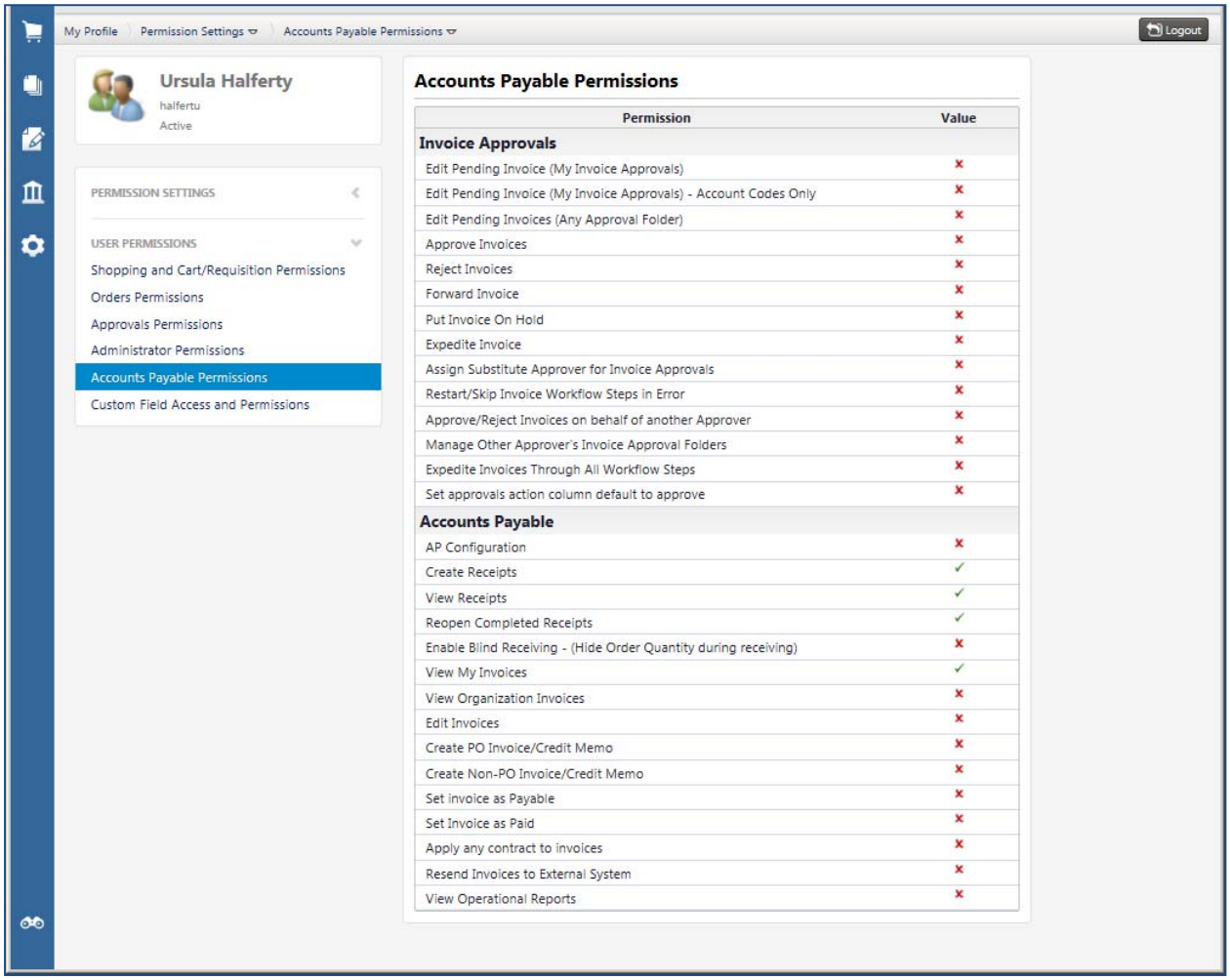


Administrator Permissions

Permission	Value
System Administration	
Administration	✗
Field Management	✗
List Management	✗
Custom Field Management	✗
Address Management	✗
Manage Shared Workflow Folders	✗
System Configuration	✗
License	✗
Transaction Reports	✗
Usage Reports	✗
Edit Company Message	✓
Edit Resource Information	✗
Contract Administrator	✗
Consortium Contract Administrator	✗
Contract Owner	✗
Advanced Dynamic Workflow	✗
Manage Integration Export Failures	✗
Edit Items/Catalogs	✗
Syndicate Items/Prices	✗
Participate in Idea Forum	✗
Access Self Help Tools	✗
View Workflow Step Details	✗
Remove All Comments	✗
Remove My Comments	✗
User Administration	
View My Profile	✓
Edit My Profile	✓
Change Password	✓
Edit Personal Information	✗
View All User Profiles	✗
Edit All User Profiles/Roles/Permissions	✗
Edit All User Profiles Only	✗
Edit Roles/Depts/Relationships	✗
Edit My Supervisor for Approvals	✗
Edit User's Financial Approvers	✗
Customize Navigation	✗
Catalog Administration	
Catalog Management	✗
Manage Content	✗
Approve All Supplier Price Files	✗
Approve Assigned Supplier Price Files	✗
Supplier Profile Administration	
Supplier Profile View Only	✗
Manage Supplier Profiles	✗
View Supplier TIN/SSN	✗

Accounts Payable Permissions

View user Accounts Payable Permissions.

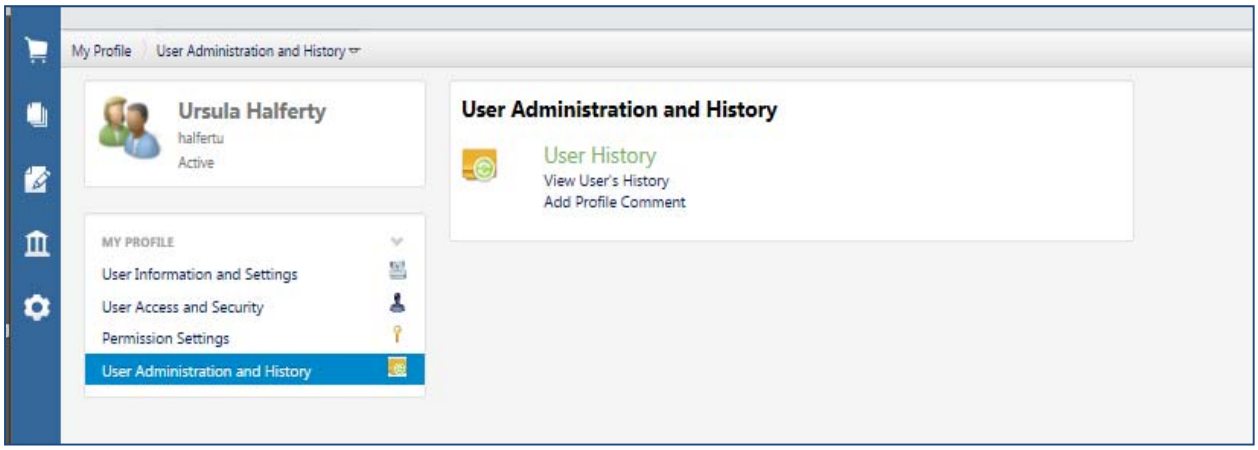


Custom Field Access and Permissions

This area allows users to view various custom field access and permissions. These are set up by the Controller's Office when the Use Profile is set up.

If changes need to be made, see the department supervisor responsible for HokieMart.

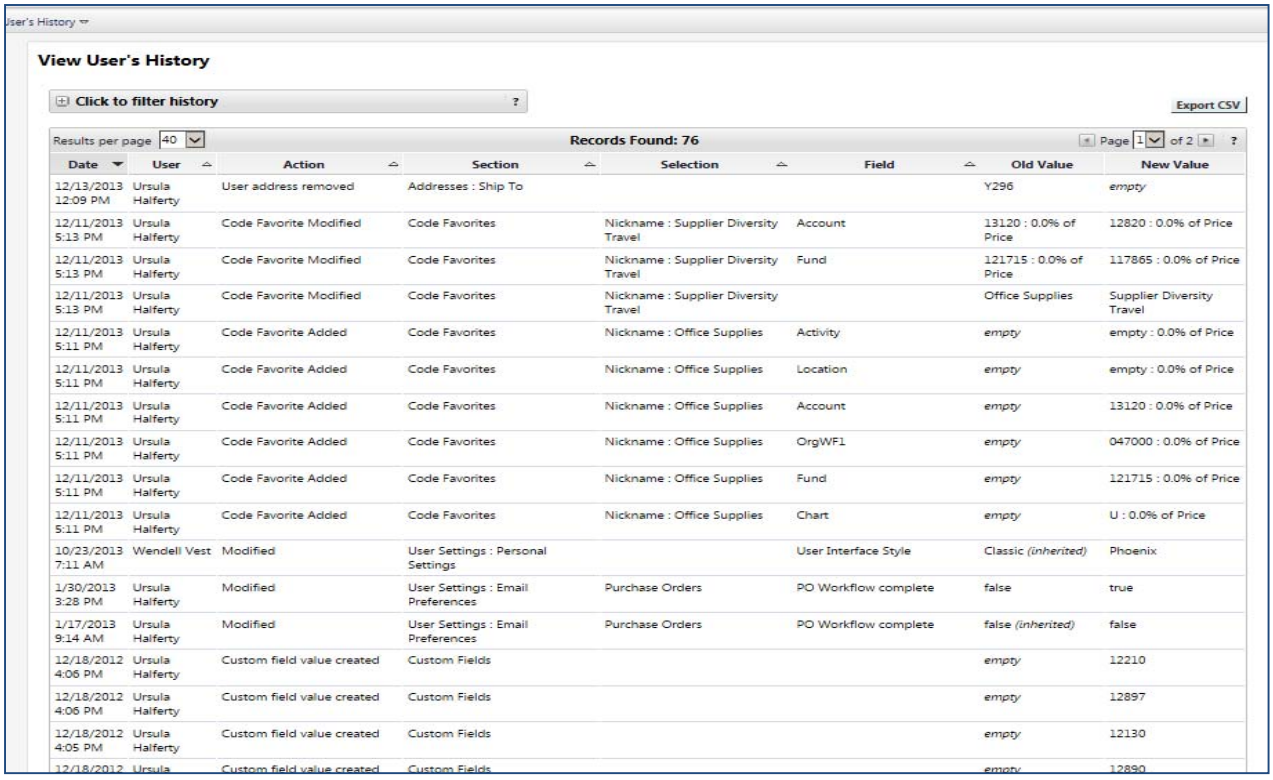
User Administration and History



User History

When an action is taken with a user ID, information will be stored in the "History" tab. Typically, "History" will display the type of permission that has been granted or removed. Additionally, the date of the action and who performed the action will also be displayed.

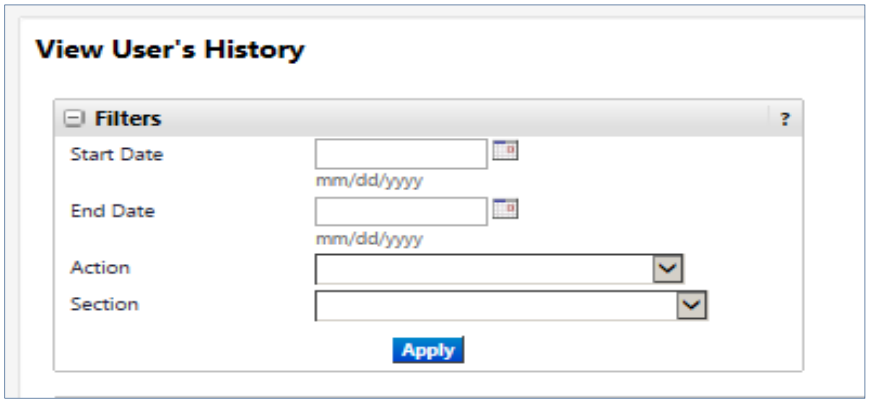
- Click "History" tab.



Date	User	Action	Section	Selection	Field	Old Value	New Value
12/13/2013 12:09 PM	Ursula Halferty	User address removed	Addresses : Ship To			Y296	*empty*
12/11/2013 5:13 PM	Ursula Halferty	Code Favorite Modified	Code Favorites	Nickname : Supplier Diversity Travel	Account	13120 : 0.0% of Price	12820 : 0.0% of Price
12/11/2013 5:13 PM	Ursula Halferty	Code Favorite Modified	Code Favorites	Nickname : Supplier Diversity Travel	Fund	121715 : 0.0% of Price	117865 : 0.0% of Price
12/11/2013 5:13 PM	Ursula Halferty	Code Favorite Modified	Code Favorites	Nickname : Supplier Diversity Travel		Office Supplies	Supplier Diversity Travel
12/11/2013 5:11 PM	Ursula Halferty	Code Favorite Added	Code Favorites	Nickname : Office Supplies	Activity	*empty*	empty : 0.0% of Price
12/11/2013 5:11 PM	Ursula Halferty	Code Favorite Added	Code Favorites	Nickname : Office Supplies	Location	*empty*	empty : 0.0% of Price
12/11/2013 5:11 PM	Ursula Halferty	Code Favorite Added	Code Favorites	Nickname : Office Supplies	Account	*empty*	13120 : 0.0% of Price
12/11/2013 5:11 PM	Ursula Halferty	Code Favorite Added	Code Favorites	Nickname : Office Supplies	OrgWF1	*empty*	047000 : 0.0% of Price
12/11/2013 5:11 PM	Ursula Halferty	Code Favorite Added	Code Favorites	Nickname : Office Supplies	Fund	*empty*	121715 : 0.0% of Price
12/11/2013 5:11 PM	Ursula Halferty	Code Favorite Added	Code Favorites	Nickname : Office Supplies	Chart	*empty*	U : 0.0% of Price
10/23/2013 7:11 AM	Wendell Vest	Modified	User Settings : Personal Settings		User Interface Style	Classic *(inherited)*	Phoenix
1/30/2013 3:28 PM	Ursula Halferty	Modified	User Settings : Email Preferences	Purchase Orders	PO Workflow complete	false	true
1/17/2013 9:14 AM	Ursula Halferty	Modified	User Settings : Email Preferences	Purchase Orders	PO Workflow complete	false *(inherited)*	false
12/18/2012 4:06 PM	Ursula Halferty	Custom field value created	Custom Fields			*empty*	12210
12/18/2012 4:06 PM	Ursula Halferty	Custom field value created	Custom Fields			*empty*	12897
12/18/2012 4:05 PM	Ursula Halferty	Custom field value created	Custom Fields			*empty*	12130
12/18/2012	Ursula	Custom field value created	Custom Fields			*empty*	12890

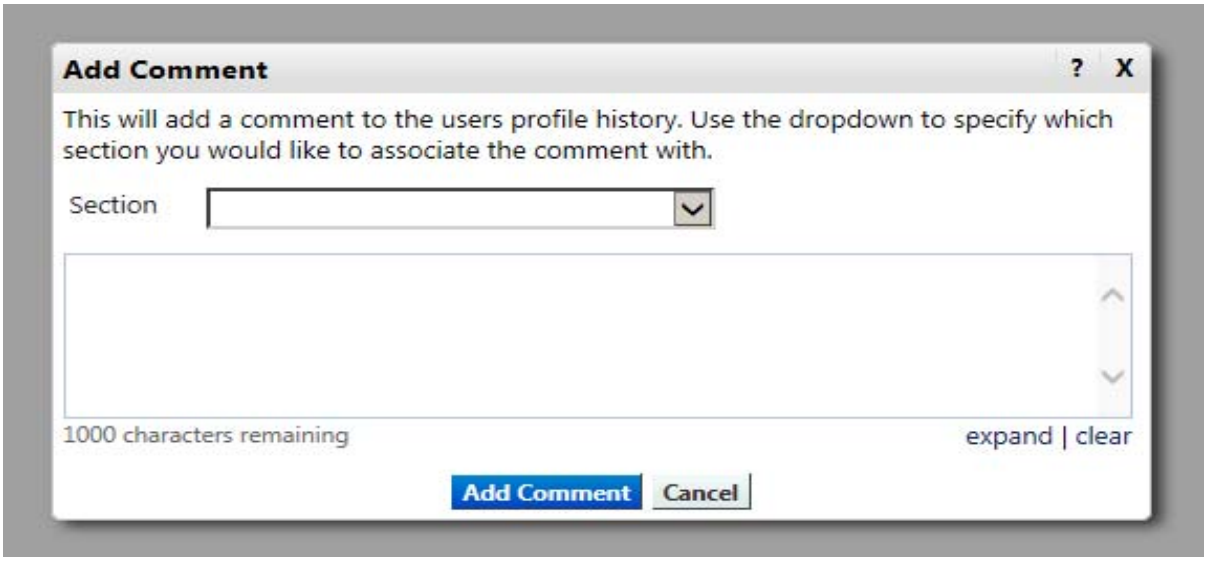
If you wish to query by specific information:

- "Click to filter history:"
    - Choose the desired "Start Date" and "End Date."
    - Choose the desired "Action" from drop-down
    - Choose the desired "Section" from drop-down.
    - Click "Apply."



A complete listing of the chosen information can be viewed.

Add Profile Comment


Add Comment
This will add a comment to the users profile history. Use the dropdown to specify which section you would like to associate the comment with.
Section
1000 characters remaining
expand | clear
Add Comment
Cancel

Change PID Password

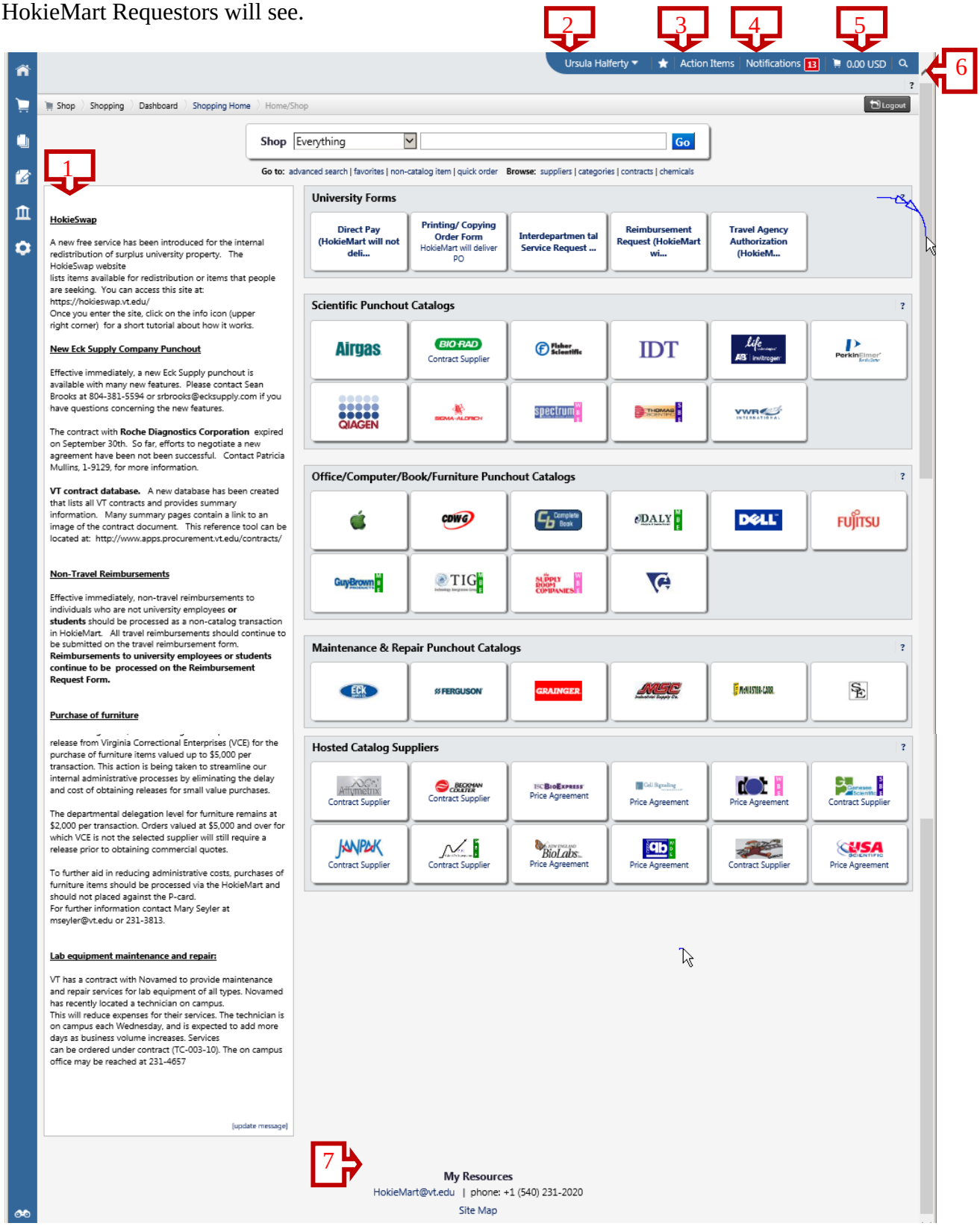
If you wish to change your PID password:

- Proceed to URL: **http://www.computing.vt.edu**
- Either:
  - Select the **"Security & IDs"** link on the left side of the page or
  - Search for **"Change Your PID Password"** option.

VirginiaTech
Invent the Future
Computing @ Virginia Tech
Advanced Search
antivirus | security
Ask a Question?
Knowledge Base
Featured
Getting Started
Banner/Warehouse
eCommunications
Instructional Support
Network Access
Personal Info & Records
Security & IDs
Software & Hardware
Support & Training Resources
Tools & Utilities
Information Technology
Communications Network Services
Research Computing
Acceptable Use Guidelines
Privacy Statement
Disclaimer Statement
My account
Log out
Current Computing Status:
Service Degraded
Information about recurring and systemic university email issues. Please click VIEW to read the entire post! Due to issues we were having in mid-December, a ticket was opened with Google to address...
All Active Statuses
Status History
view
Welcome to Computing @ Virginia Tech!
Welcome to the one-stop computing resource site for Virginia Tech. With Computing @ Virginia Tech, you only have to remember one address to find anything and everything about using your computer at Virginia Tech. Faculty and staff may also refer to the Information Technology Reference Guide (PDF).
What's New
Adding Your Computer to the Central Services Domain in Mac OS X v10.9
Knowledge Base Article
1 day 2 hours ago
Question: How do I join my computer to the Central Services domain in Mac OS X v10.9? Answer:...
view
Stopping Email from Going to Spam in VT Google Apps Mail
Knowledge Base Article
1 day 19 hours ago
Question: How do I stop legitimate email from being filtered to the Spam folder of my VT Google...
view
Finding Information on Virginia Tech Online Graduate Courses
Knowledge Base Article
3 weeks 4 days ago
Question: Where do I find more information about Virginia Tech Online (VTOnline) graduate courses?
view
Transitioning
Everything you need to know about transitioning at Virginia Tech. Whether you're a new student, new faculty/staff, or a recent graduate - we have collected all the information you need to know, as well as what you can expect from computing at VT, in one convenient place.
New Alumni
Everything you need to know as an Alumnus of Virginia Tech.
New Faculty/Staff
Everything you need to know to begin your career at Virginia Tech.
New Students
Everything you need to know as a New Virginia Tech Student.
Featured Content

Home Page of HokieMart

The home page, also sometimes referred to as the landing page or main screen, is first screen that HokieMart Requestors will see.


2
3
4
5
6
1
7
Ursula Halferty
Action Items
Notifications 13
0.00 USD
Shop
Shopping
Dashboard
Shopping Home
Home/Shop
Logout
Shop Everything Go
Go to: advanced search | favorites | non-catalog item | quick order
Browse: suppliers | categories | contracts | chemicals
HokieSwap
A new free service has been introduced for the internal redistribution of surplus university property. The HokieSwap website lists items available for redistribution or items that people are seeking. You can access this site at: https://hokieswap.vt.edu/ Once you enter the site, click on the info icon (upper right corner) for a short tutorial about how it works.
New Eck Supply Company Punchout
Effective immediately, a new Eck Supply punchout is available with many new features. Please contact Sean Brooks at 804-381-5594 or srbrooks@ecksupply.com if you have questions concerning the new features.
The contract with Roche Diagnostics Corporation expired on September 30th. So far, efforts to negotiate a new agreement have been not been successful. Contact Patricia Mullins, 1-9129, for more information.
VT contract database. A new database has been created that lists all VT contracts and provides summary information. Many summary pages contain a link to an image of the contract document. This reference tool can be located at: http://www.apps.procurement.vt.edu/contracts/
Non-Travel Reimbursements
Effective immediately, non-travel reimbursements to individuals who are not university employees or students should be processed as a non-catalog transaction in HokieMart. All travel reimbursements should continue to be submitted on the travel reimbursement form. Reimbursements to university employees or students continue to be processed on the Reimbursement Request Form.
Purchase of furniture
release from Virginia Correctional Enterprises (VCE) for the purchase of furniture items valued up to $5,000 per transaction. This action is being taken to streamline our internal administrative processes by eliminating the delay and cost of obtaining releases for small value purchases.
The departmental delegation level for furniture remains at $2,000 per transaction. Orders valued at $5,000 and over for which VCE is not the selected supplier will still require a release prior to obtaining commercial quotes.
To further aid in reducing administrative costs, purchases of furniture items should be processed via the HokieMart and should not placed against the P-card. For further information contact Mary Seyler at mseyler@vt.edu or 231-3813.
Lab equipment maintenance and repair:
VT has a contract with Novamed to provide maintenance and repair services for lab equipment of all types. Novamed has recently located a technician on campus. This will reduce expenses for their services. The technician is on campus each Wednesday, and is expected to add more days as business volume increases. Services can be ordered under contract (TC-003-10). The on campus office may be reached at 231-4657
[update message]
University Forms
Direct Pay (HokieMart will not deli...
Printing/ Copying Order Form HokieMart will deliver PO
Interdepartmen tal Service Request ...
Reimbursement Request (HokieMart wi...
Travel Agency Authorization (HokieM...
Scientific Punchout Catalogs
Airgas
Bio-Rad Contract Supplier
Fisher Scientific
IDT
Life Technologies
PerkinElmer
QIAGEN
Sigma-Aldrich
Spectrum
Thomas Scientific
VWR International
Office/Computer/Book/Furniture Punchout Catalogs
CDW-G
Complete Book
DALY
DELL
FUJITSU
GuyBrown
TIG
The Supply Room Companies
Maintenance & Repair Punchout Catalogs
Eck
Ferguson
Grainger
MSC
Praxair
Hosted Catalog Suppliers
Affymetrix Contract Supplier
Beckman Coulter Contract Supplier
BioExpress Price Agreement
Cell Signaling Price Agreement
Price Agreement
Compass Scientific Contract Supplier
Janpak Contract Supplier
Contract Supplier
BioLabs Price Agreement
Price Agreement
Contract Supplier
USA Scientific Price Agreement
My Resources
HokieMart@vt.edu | phone: +1 (540) 231-2020
Site Map

Areas of HokieMart Home Page Defined

1. **Message Board** is located in the upper left of the main screen. It provides users with current news, upcoming events, announcements of new contracts, and other pertinent information. The messages are university (organizationally) related to HokieMart.

2. **User Profile** allows users to access their personal profile by selecting the drop-down menu and selecting **View My Profile**.
3. **Action Items**, located on the left-hand side of the Home Page, provides a quick link to recent and completed Carts, Requisitions, and Purchase Orders.

4. **Notifications** can be viewed from this drop down menu and are accessible from all areas of the HokieMart application. Certain actions trigger notifications to specified users. Notifications are clickable and take you to the appropriate area of the application.

5. **Cart Preview** allows the user to view active cart from anywhere in the application.

6. **Quick Search icon** is available from all pages but remains hidden until it is selected to display. Quick key ALT + Q to access the Quick Search menu.
7. **My Resources** located at the bottom of the main screen is resource information on how to contact the HokieMart Help Desk.

Navigation in HokieMart

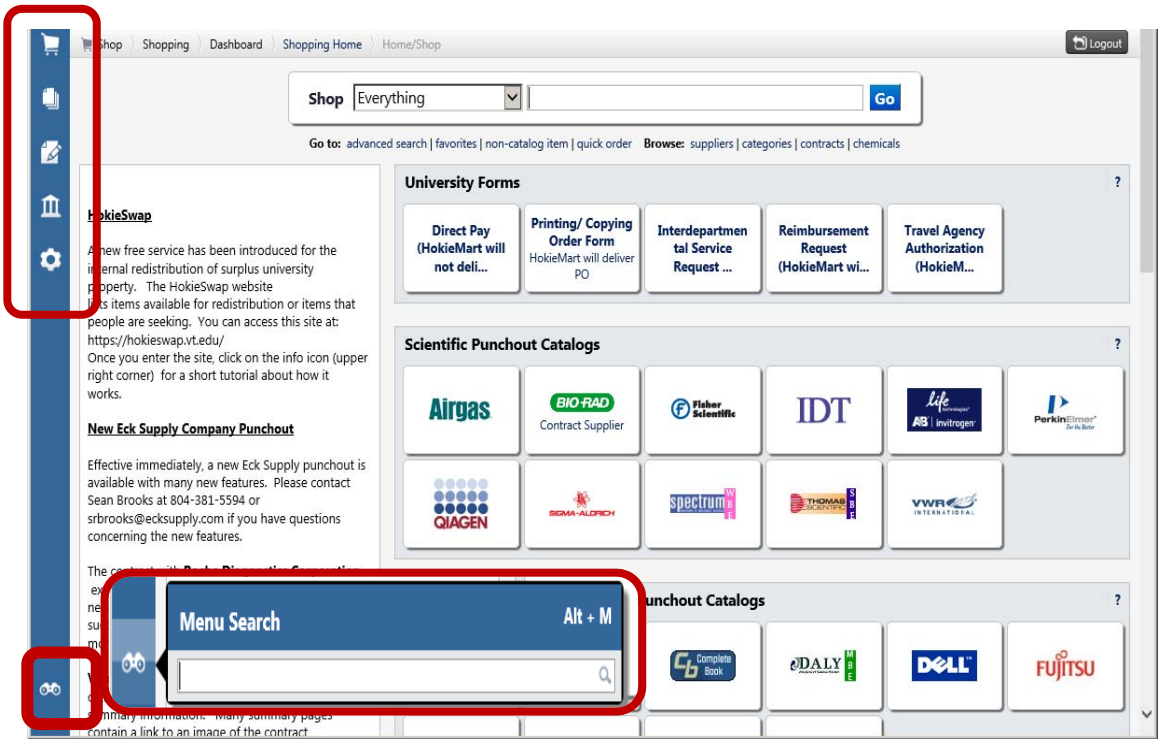
Information contained in this section has been taken from Phoenix User Interface Training Guide September 2013, SciQuest

To view the complete Phoenix User Interface Training Guide (September 2013) visit the Procurement web-site: **http://www.procurement.vt.edu/HokieMart/training.html**

As of January 2014 HokieMart will have a new user interface. This new view may at times be referred to as the Phoenix interface (PI).

Navigation is driven by slide out menus that display available menu options. The menu items stay out of the way until they are needed *(highlighted in red*). The menu options are grouped by related tasks, making them easy to locate. These areas are reviewed in detail in other sections of the User Guides

A new feature available in the Phoenix interface is Menu Search. The Menu Search option allows the user to find pages that are not frequently used (*highlighted in yellow*).


Shop
Shopping
Dashboard
Shopping Home
Home/Shop
Logout
Shop
Everything
Go
Go to: advanced search | favorites | non-catalog item | quick order
Browse: suppliers | categories | contracts | chemicals
University Forms
Direct Pay (HokieMart will not deli...
Printing/ Copying Order Form
HokieMart will deliver PO
Interdepartmental Service Request ...
Reimbursement Request (HokieMart wi...
Travel Agency Authorization (HokieM...
HokieSwap
A new free service has been introduced for the internal redistribution of surplus university property. The HokieSwap website lists items available for redistribution or items that people are seeking. You can access this site at: https://hokieswap.vt.edu/
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Effective immediately, a new Eck Supply punchout is available with many new features. Please contact Sean Brooks at 804-381-5594 or srbrooks@ecksupply.com if you have questions concerning the new features.
Scientific Punchout Catalogs
Airgas
BIO-RAD
Contract Supplier
Fisher Scientific
IDT
Life Invitrogen
PerkinElmer
QIAGEN
SIGMA-ALDRICH
spectrum
THOMAS SCIENTIFIC
VWR INTERNATIONAL
Menu Search
Alt + M
unchout Catalogs
Complete Book
DALY
DELL
FUJITSU

General Information About Navigation

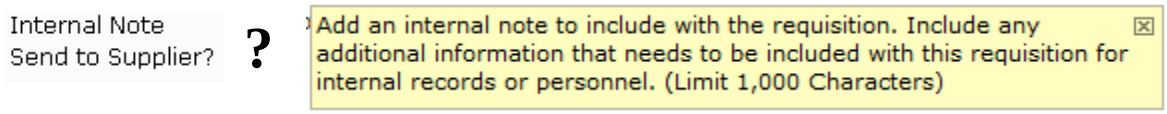
The Back Button

Do Not Use the BACK button associated with any browser. It may have a negative impact on the shopping cart.

Question Mark

Questions Marks are visible in several locations within HokieMart. By placing the cursor in the desired area information, a question mark will appear. This will cause a text box to display a definition or provide details about a particular function or operation.

Example:

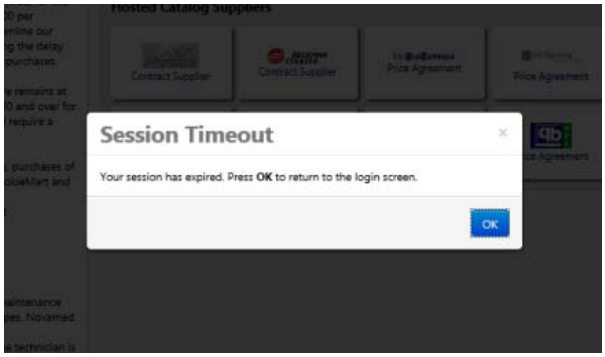

Internal Note
Send to Supplier?
?
Add an internal note to include with the requisition. Include any additional information that needs to be included with this requisition for internal records or personnel. (Limit 1,000 Characters)

Plus (+) or Minus (-)

Plus or minus symbols are used to maximize or minimize display boxes within HokieMart.

Time-Out Sessions

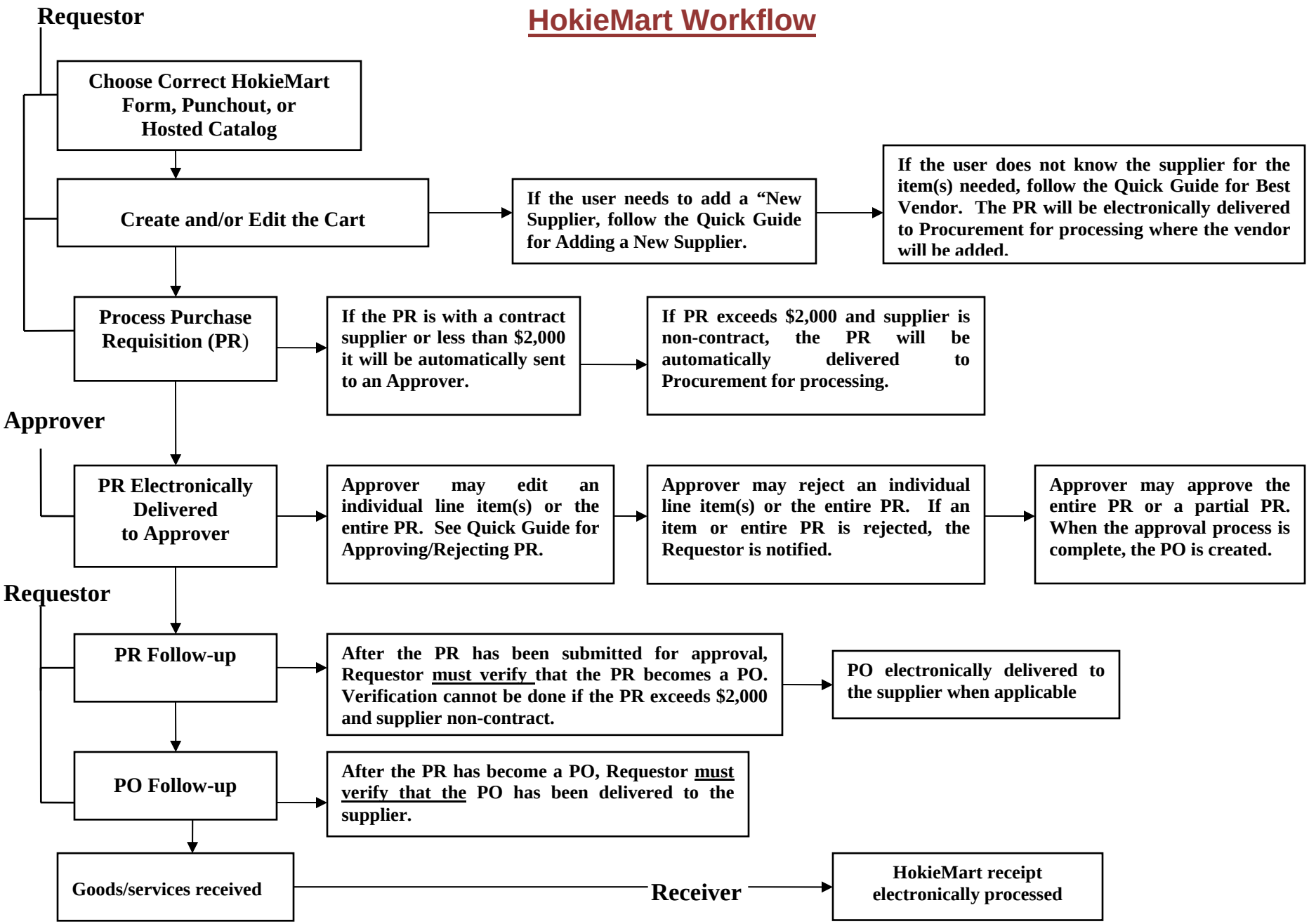
The HokieMart will “time out” after one hour. If a user has not “been active” in the application during that time period, the application will become inactive. Before any further action can be taken, the user must login again by clicking on “OK”



OR by using the main login screen.

Important: Individual Punchouts have time-out periods. These, however, are determined by the various vendors/ suppliers. It is suggested if users will not be active in HokieMart for an extended period of time, they should "**Save**" the cart.

HokieMart Workflow


Requestor
Choose Correct HokieMart Form, Punchout, or Hosted Catalog
Create and/or Edit the Cart
If the user needs to add a "New Supplier, follow the Quick Guide for Adding a New Supplier.
If the user does not know the supplier for the item(s) needed, follow the Quick Guide for Best Vendor. The PR will be electronically delivered to Procurement for processing where the vendor will be added.
Process Purchase Requisition (PR)
If the PR is with a contract supplier or less than $2,000 it will be automatically sent to an Approver.
If PR exceeds $2,000 and supplier is non-contract, the PR will be automatically delivered to Procurement for processing.
Approver
PR Electronically Delivered to Approver
Approver may edit an individual line item(s) or the entire PR. See Quick Guide for Approving/Rejecting PR.
Approver may reject an individual line item(s) or the entire PR. If an item or entire PR is rejected, the Requestor is notified.
Approver may approve the entire PR or a partial PR. When the approval process is complete, the PO is created.
Requestor
PR Follow-up
After the PR has been submitted for approval, Requestor must verify that the PR becomes a PO. Verification cannot be done if the PR exceeds $2,000 and supplier non-contract.
PO electronically delivered to the supplier when applicable
PO Follow-up
After the PR has become a PO, Requestor must verify that the PO has been delivered to the supplier.
Goods/services received
Receiver
HokieMart receipt electronically processed

Suppliers in HokieMart

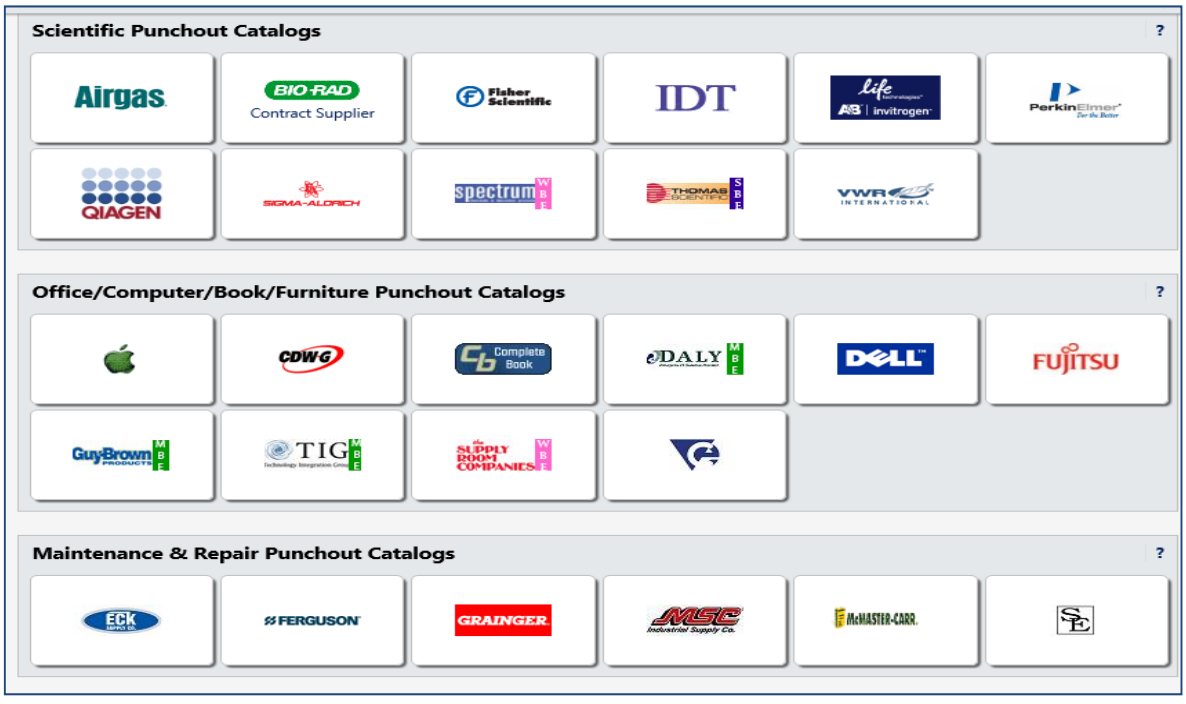
There are three basic types of vendors/suppliers in HokieMart: 1) Hosted Catalog Suppliers, 2) Punchout Suppliers, and 3) Non-Catalog Item Suppliers. The type of suppliers you select will dictate the manner in which you search for products and process your order in HokieMart.

Hosted Catalog Suppliers

There are approximately 200 **Hosted Catalog Suppliers** in HokieMart. The majority of these catalogs contain scientific products.

Punchout Suppliers

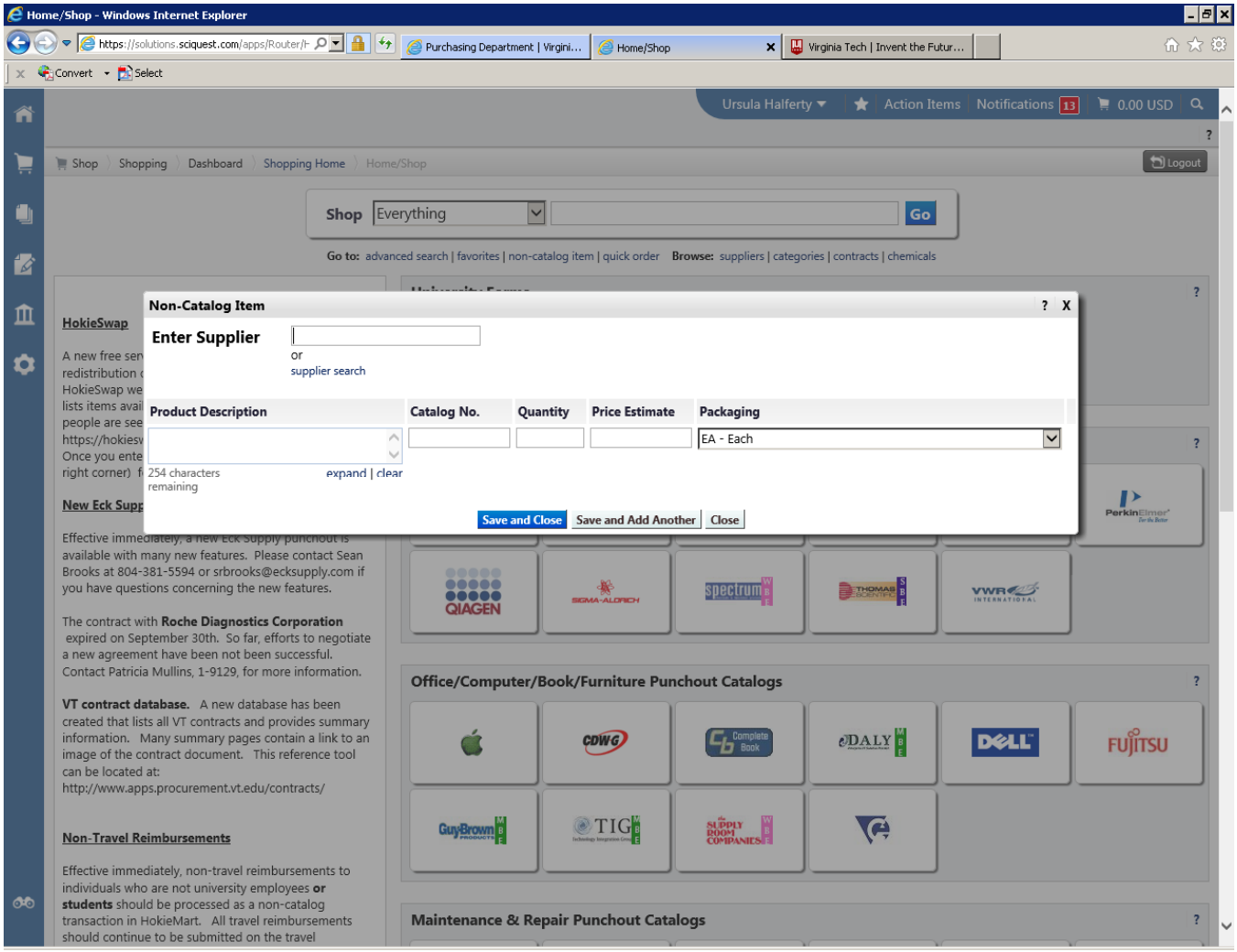
The Punchout contract suppliers are linked to HokieMart through direct access to their websites. These suppliers are familiar and have been preferred suppliers in the past. Departments have unlimited purchasing authority when using these suppliers, except for computer technology vendors such as Dell, Apple, Fujitsu and Daly. **The purchasing authority has been capped at $20,000 for computer technology suppliers.**



Non-Catalog Item Suppliers

Non-Catalog Suppliers are used when an item(s) is not available in a Hosted Catalog or in a Punchout.

HokieMart is the official tool for processing all PRs and should be used for all purchases except those specified for use of the Purchasing Card.


Home/Shop - Windows Internet Explorer
Purchasing Department | Virgini...
Home/Shop
Virginia Tech | Invent the Futur...
Convert
Select
Ursula Halferty
Action Items
Notifications
0.00 USD
Shop
Shopping
Dashboard
Shopping Home
Home/Shop
Logout
Shop
Everything
Go
Go to: advanced search | favorites | non-catalog item | quick order
Browse: suppliers | categories | contracts | chemicals
Non-Catalog Item
Enter Supplier
or
supplier search
Product Description
Catalog No.
Quantity
Price Estimate
Packaging
EA - Each
254 characters remaining
expand | clear
Save and Close
Save and Add Another
Close
HokieSwap
New Eck Supp
Effective immediately, a new Eck Supply punchout is available with many new features. Please contact Sean Brooks at 804-381-5594 or srbrooks@ecksupply.com if you have questions concerning the new features.
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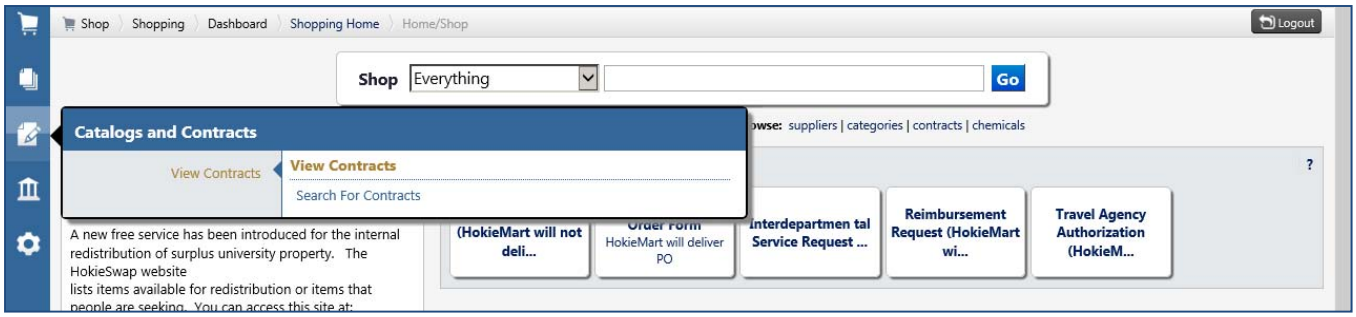
QIAGEN
SIGMA-ALDRICH
spectrum
VWR
PerkinElmer
Office/Computer/Book/Furniture Punchout Catalogs
CDWG
DELL
FUJITSU
GuyBrown
TIG
Maintenance & Repair Punchout Catalogs

Contract Suppliers

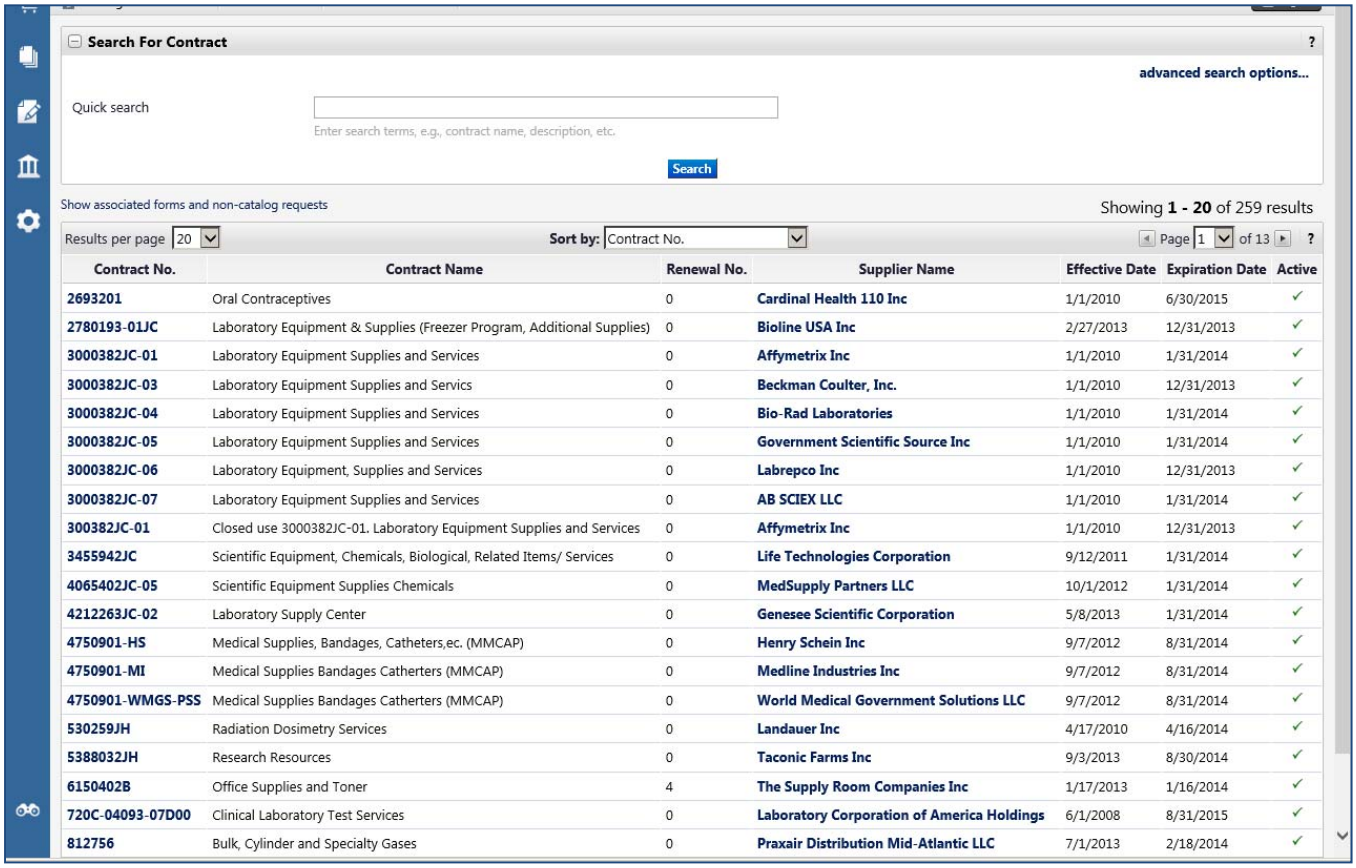
Searching for Contract Suppliers

University contract suppliers are distinguished by the symbol to the right of the vendor. Examples of contract suppliers are Fisher Scientific, Sigma-Aldrich, and VWR International. University departments have unlimited purchasing authority, when using contract suppliers with the exception of a $20,000 limit on the purchase of computers.



Using contracts in HokieMart will allow users the ability to:

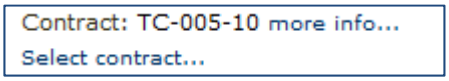
- use contracts available to their department.
- review information about a contract (dates, description, etc.).
- search for a contract.


Search For Contract
advanced search options...
Quick search
Enter search terms, e.g., contract name, description, etc.
Search
Show associated forms and non-catalog requests
Showing 1 - 20 of 259 results
Results per page 20
Sort by: Contract No.
Page 1 of 13

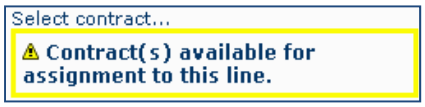
Contract No.	Contract Name	Renewal No.	Supplier Name	Effective Date	Expiration Date	Active
2693201	Oral Contraceptives	0	Cardinal Health 110 Inc	1/1/2010	6/30/2015	✓
2780193-01JC	Laboratory Equipment & Supplies (Freezer Program, Additional Supplies)	0	Bioline USA Inc	2/27/2013	12/31/2013	✓
3000382JC-01	Laboratory Equipment Supplies and Services	0	Affymetrix Inc	1/1/2010	1/31/2014	✓
3000382JC-03	Laboratory Equipment Supplies and Servics	0	Beckman Coulter, Inc.	1/1/2010	12/31/2013	✓
3000382JC-04	Laboratory Equipment Supplies and Services	0	Bio-Rad Laboratories	1/1/2010	1/31/2014	✓
3000382JC-05	Laboratory Equipment Supplies and Services	0	Government Scientific Source Inc	1/1/2010	1/31/2014	✓
3000382JC-06	Laboratory Equipment, Supplies and Services	0	Labrepco Inc	1/1/2010	12/31/2013	✓
3000382JC-07	Laboratory Equipment Supplies and Services	0	AB SCIEX LLC	1/1/2010	1/31/2014	✓
300382JC-01	Closed use 3000382JC-01. Laboratory Equipment Supplies and Services	0	Affymetrix Inc	1/1/2010	12/31/2013	✓
3455942JC	Scientific Equipment, Chemicals, Biological, Related Items/ Services	0	Life Technologies Corporation	9/12/2011	1/31/2014	✓
4065402JC-05	Scientific Equipment Supplies Chemicals	0	MedSupply Partners LLC	10/1/2012	1/31/2014	✓
4212263JC-02	Laboratory Supply Center	0	Genesee Scientific Corporation	5/8/2013	1/31/2014	✓
4750901-HS	Medical Supplies, Bandages, Catheters,ec. (MMCAP)	0	Henry Schein Inc	9/7/2012	8/31/2014	✓
4750901-MI	Medical Supplies Bandages Catherters (MMCAP)	0	Medline Industries Inc	9/7/2012	8/31/2014	✓
4750901-WMGS-PSS	Medical Supplies Bandages Catherters (MMCAP)	0	World Medical Government Solutions LLC	9/7/2012	8/31/2014	✓
530259JH	Radiation Dosimetry Services	0	Landauer Inc	4/17/2010	4/16/2014	✓
5388032JH	Research Resources	0	Taconic Farms Inc	9/3/2013	8/30/2014	✓
6150402B	Office Supplies and Toner	4	The Supply Room Companies Inc	1/17/2013	1/16/2014	✓
720C-04093-07D00	Clinical Laboratory Test Services	0	Laboratory Corporation of America Holdings	6/1/2008	8/31/2015	✓
812756	Bulk, Cylinder and Specialty Gases	0	Praxair Distribution Mid-Atlantic LLC	7/1/2013	2/18/2014	✓

Users Who Have Access To A Contract

When entering an order in HokieMart, the contract number will automatically populate when the contract is a **university wide** contract (available for all users).



"Select contract" will appear only when a contract may be **university-wide** but not all good/services are included in the contract.

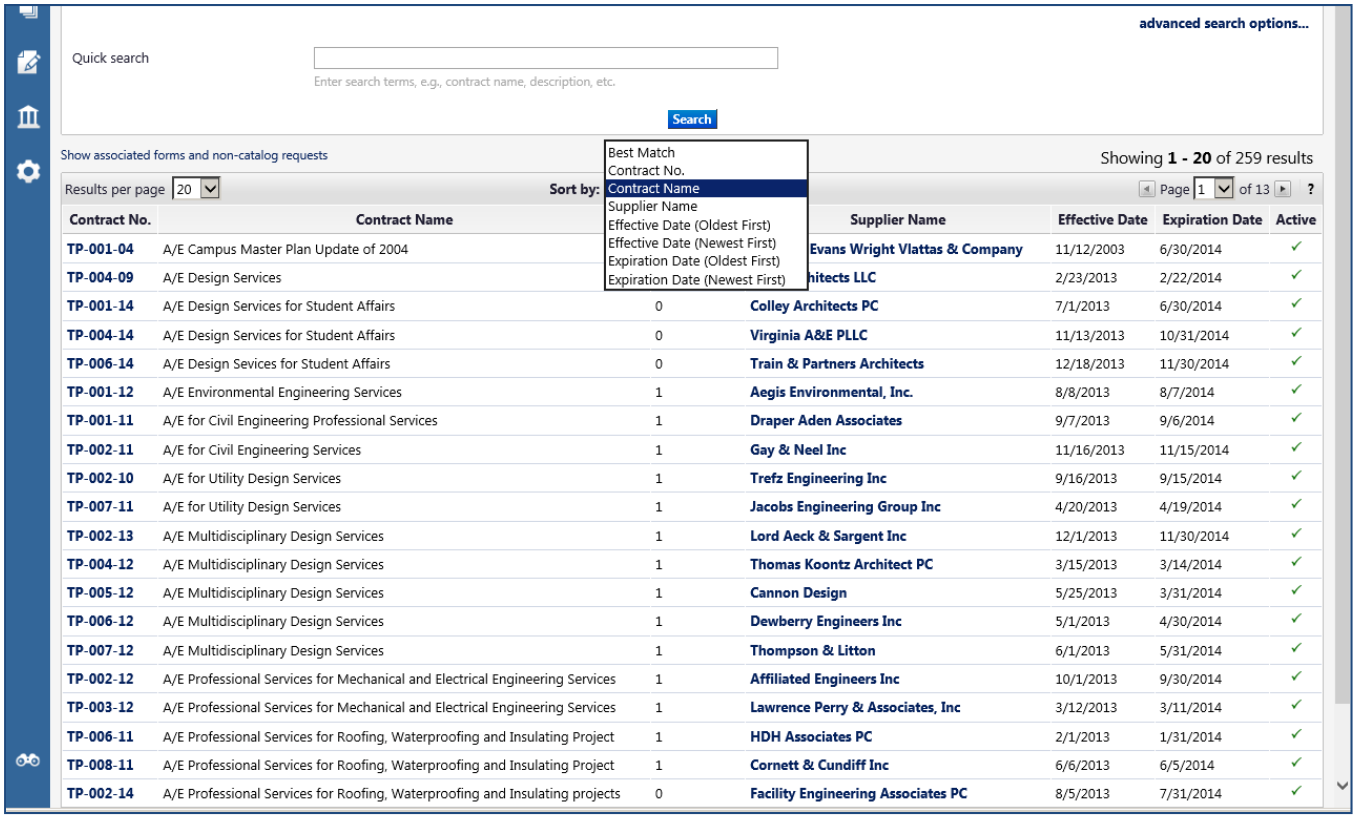


These instructions will allow users to identify which contracts are available to them and whether they have visibility privileges to a specific contract. Privileges, full or partial viewing will be possible.

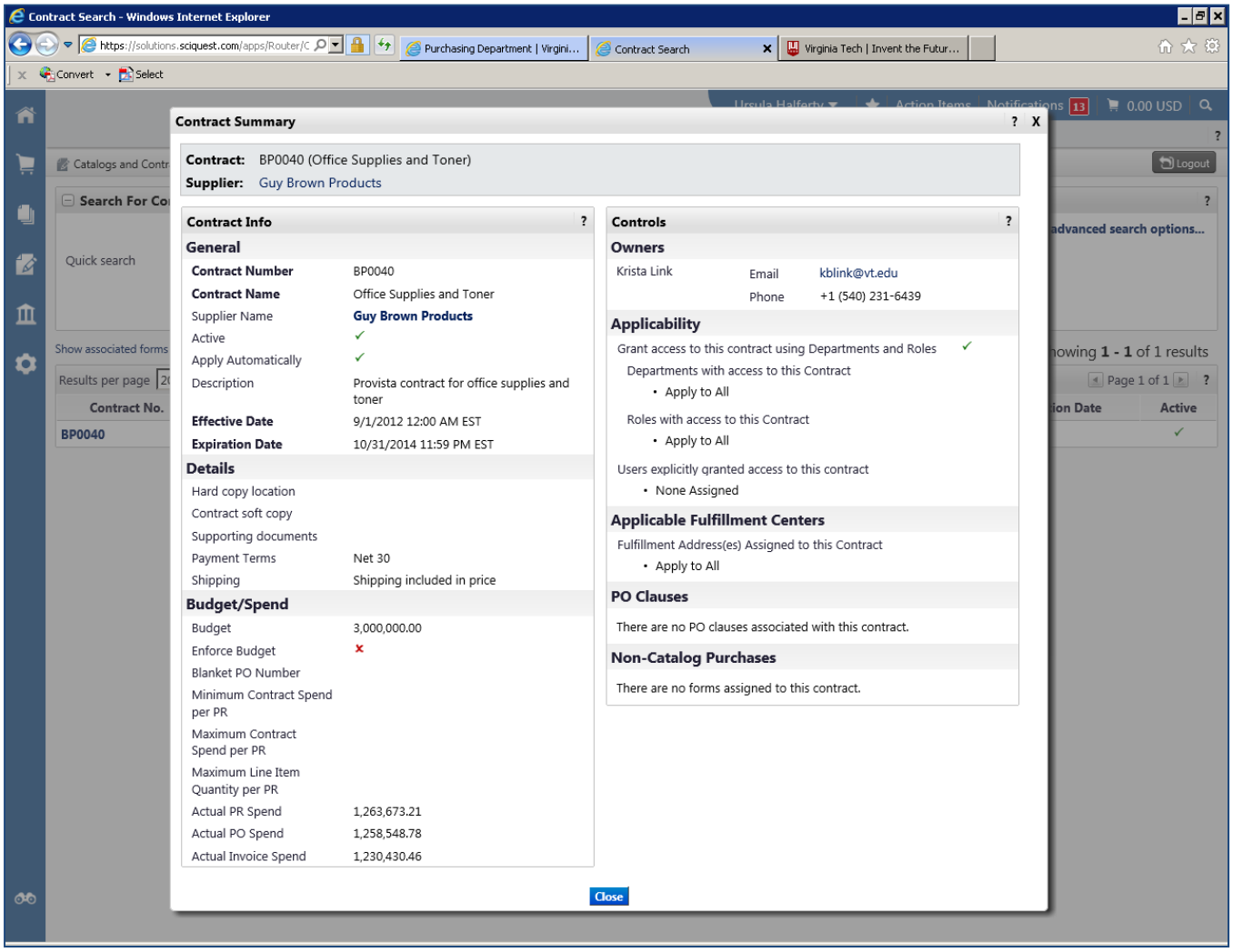
From the Main Screen of HokieMart,

- Click on the "contracts" icon on the task bar located on the left hand side of the screen, as shown in the previous section.

- There are two searches available; Quick Search and Advanced Search.
  - Enter desired supplier, item description, or contract name.
  - Click "Search."
  - If you wish to view general information about all contracts, select Search. A listing of all contracts will be displayed.


advanced search options...
Quick search
Enter search terms, e.g., contract name, description, etc.
Search
Show associated forms and non-catalog requests
Best Match
Contract No.
Contract Name
Supplier Name
Effective Date (Oldest First)
Effective Date (Newest First)
Expiration Date (Oldest First)
Expiration Date (Newest First)
Showing 1 - 20 of 259 results
Results per page 20
Sort by:
Page 1 of 13
Contract No. | Contract Name | Supplier Name | Effective Date | Expiration Date | Active
TP-001-04 | A/E Campus Master Plan Update of 2004 | Evans Wright Vlattas & Company | 11/12/2003 | 6/30/2014
TP-004-09 | A/E Design Services | 2/23/2013 | 2/22/2014
TP-001-14 | A/E Design Services for Student Affairs | 0 | Colley Architects PC | 7/1/2013 | 6/30/2014
TP-004-14 | A/E Design Services for Student Affairs | 0 | Virginia A&E PLLC | 11/13/2013 | 10/31/2014
TP-006-14 | A/E Design Sevices for Student Affairs | 0 | Train & Partners Architects | 12/18/2013 | 11/30/2014
TP-001-12 | A/E Environmental Engineering Services | 1 | Aegis Environmental, Inc. | 8/8/2013 | 8/7/2014
TP-001-11 | A/E for Civil Engineering Professional Services | 1 | Draper Aden Associates | 9/7/2013 | 9/6/2014
TP-002-11 | A/E for Civil Engineering Services | 1 | Gay & Neel Inc | 11/16/2013 | 11/15/2014
TP-002-10 | A/E for Utility Design Services | 1 | Trefz Engineering Inc | 9/16/2013 | 9/15/2014
TP-007-11 | A/E for Utility Design Services | 1 | Jacobs Engineering Group Inc | 4/20/2013 | 4/19/2014
TP-002-13 | A/E Multidisciplinary Design Services | 1 | Lord Aeck & Sargent Inc | 12/1/2013 | 11/30/2014
TP-004-12 | A/E Multidisciplinary Design Services | 1 | Thomas Koontz Architect PC | 3/15/2013 | 3/14/2014
TP-005-12 | A/E Multidisciplinary Design Services | 1 | Cannon Design | 5/25/2013 | 3/31/2014
TP-006-12 | A/E Multidisciplinary Design Services | 1 | Dewberry Engineers Inc | 5/1/2013 | 4/30/2014
TP-007-12 | A/E Multidisciplinary Design Services | 1 | Thompson & Litton | 6/1/2013 | 5/31/2014
TP-002-12 | A/E Professional Services for Mechanical and Electrical Engineering Services | 1 | Affiliated Engineers Inc | 10/1/2013 | 9/30/2014
TP-003-12 | A/E Professional Services for Mechanical and Electrical Engineering Services | 1 | Lawrence Perry & Associates, Inc | 3/12/2013 | 3/11/2014
TP-006-11 | A/E Professional Services for Roofing, Waterproofing and Insulating Project | 1 | HDH Associates PC | 2/1/2013 | 1/31/2014
TP-008-11 | A/E Professional Services for Roofing, Waterproofing and Insulating Project | 1 | Cornett & Cundiff Inc | 6/6/2013 | 6/5/2014
TP-002-14 | A/E Professional Services for Roofing, Waterproofing and Insulating projects | 0 | Facility Engineering Associates PC | 8/5/2013 | 7/31/2014

- Click on the desired contract number for detailed information about the contract. In this example, Guy Brown was chosen.



Please note the **Effective Date** and **Expiration Date**, the contract access (Apply to All), meaning that any VT department may use this contract; the description of products covered by the contract, etc.

HokieMart Contracts

Using HokieMart contracts allow a user to eliminate the:

- decision of which form to use
- need to know whether a contract exists
- need to know a contract number

Contract will also provide a user the ability to:

- use contracts available to their department
- review information about a contract (dates, description, etc.)
- search for a contract

General Contract Information

Contracts are set up with the ordering address. Payment addresses against contracts may not be listed in the supplier search. Please choose the ordering address (usually the bold address) and the Controller's Office will process the payment to the correct payment address.

Copier Contracts

COPIER MAINTENANCE/ RENTAL PAYMENTS

Process as a contract purchase, by **SELECTING THE CONTRACT** on the Non-Catalog form, when the warning message is displayed (see Quick Guide for Non-Catalog Items).

NEW COPIER PURCHASE AND FIRST-YEAR MAINTENANCE AGREEMENTS

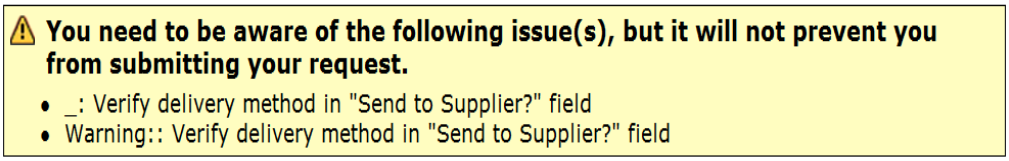
Process new copier purchase and first-year maintenance agreements on a Non-Catalog Item form **WITHOUT SELECTING THE CONTRACT**. The Procurement Department will continue to process a university PO for copier rental. The Procurement Department will continue to process a PO for the new copier and the initial (first year) maintenance agreement. All subsequent maintenance/rental payments will be processed by **SELECTING THE CONTRACT.**

Software And Equipment Maintenance Agreements

To make maintenance payments for software and equipment agreements for multiple years greater than $2,000, process the Non-Catalog Item form selecting the original PO number generated for maintenance**.**

Contract Warning Message

A warning message will be displayed to remind the user to select "SciQuest Will Deliver" or "User Will Deliver" (the user is now responsible for sending the PO to the vendor). After selecting the desired delivery method, proceed to complete the PR.


You need to be aware of the following issue(s), but it will not prevent you from submitting your request.
_: Verify delivery method in "Send to Supplier?" field
Warning:: Verify delivery method in "Send to Supplier?" field

For Issues With A Contract

If you process a PR to a supplier which you previously believed to be a contract supplier, but the contract selection process is not available, please contact the HokieMart Helpline hokiemart@vt.edu. Provide the contract supplier and contract number. The problem will be researched and a response sent to the user advising of the availability of this contract.

PLEASE REFER TO THE NON-CATALOG ITEM QUICK GUIDE FOR INSTRUCTIONS ON PREPARING THE FORM.

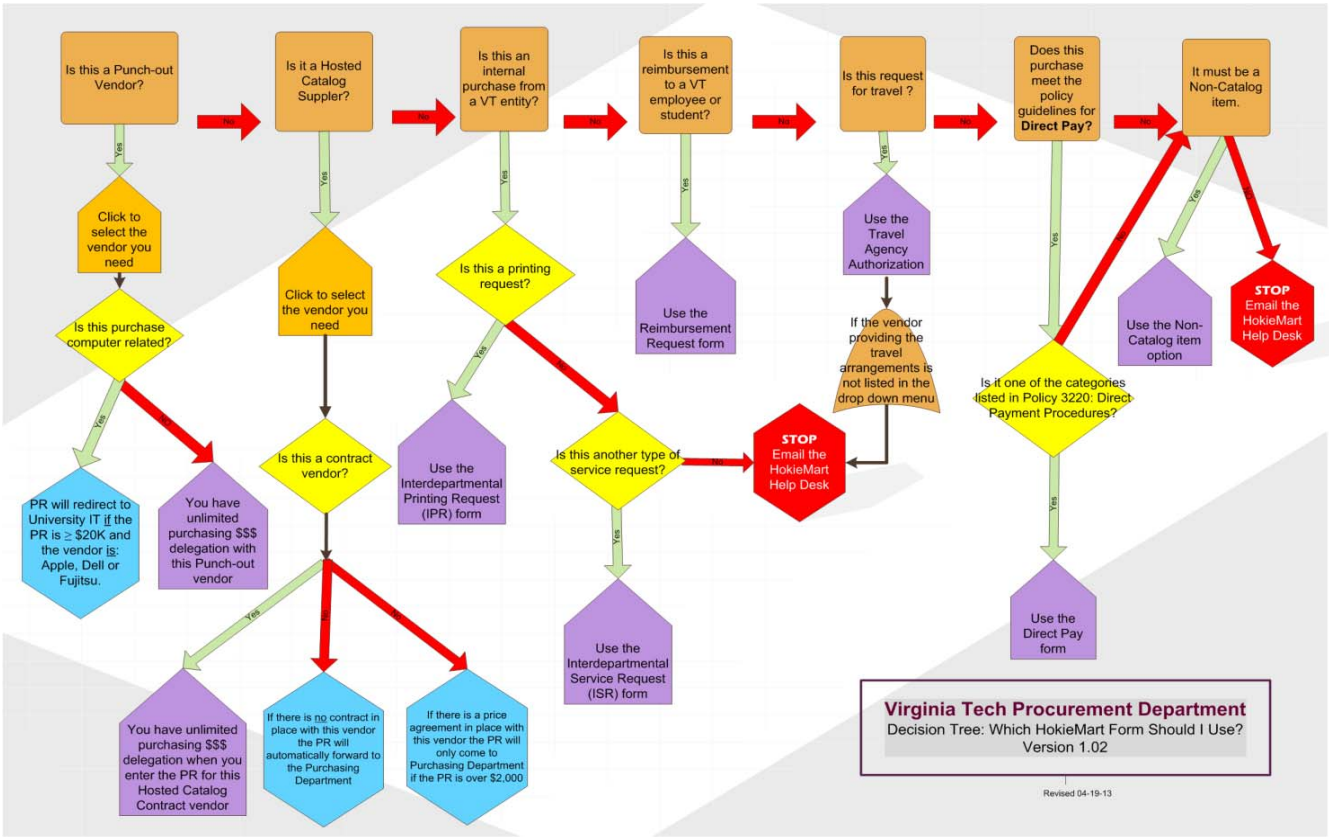
HokieMart Forms

There are 8 basic screen forms for 9 purchasing processes that allow users to enter Purchase Requisitions in HokieMart. In this section the various forms will be reviewed. The section entitled, **Processing Orders in HokieMart** will provide details on how to enter an order after selecting the correct form.

- Hosted Catalog
- Punchout
- Non-Catalog Item
- Direct Pay
- Interdepartmental Printing Request
- Interdepartmental Service Request
- Reimbursement Request
- Travel Agency Authorization

HokieMart Form Decision Tree

This Decision Tree has been designed to assist users when making a selection and deciding which form to use to enter a purchase requisition. For additional information, please see the VT Electronic Business System: Forms Process Guide under the Forms / Process Overview link: http:// www.procurement.vt.edu/HokieMart/Forms_Processes.pdf


Is this a Punch-out Vendor?
Is it a Hosted Catalog Suppler?
Is this an internal purchase from a VT entity?
Is this a reimbursement to a VT employee or student?
Is this request for travel ?
Does this purchase meet the policy guidelines for Direct Pay?
It must be a Non-Catalog item.
Click to select the vendor you need
Is this purchase computer related?
PR will redirect to University IT if the PR is ≥ $20K and the vendor is: Apple, Dell or Fujitsu.
You have unlimited purchasing $$$ delegation with this Punch-out vendor
Click to select the vendor you need
Is this a contract vendor?
You have unlimited purchasing $$$ delegation when you enter the PR for this Hosted Catalog Contract vendor
If there is no contract in place with this vendor the PR will automatically forward to the Purchasing Department
If there is a price agreement in place with this vendor the PR will only come to Purchasing Department if the PR is over $2,000
Is this a printing request?
Use the Interdepartmental Printing Request (IPR) form
Use the Reimbursement Request form
Is this another type of service request?
Use the Interdepartmental Service Request (ISR) form
STOP Email the HokieMart Help Desk
Use the Travel Agency Authorization
If the vendor providing the travel arrangements is not listed in the drop down menu
Is it one of the categories listed in Policy 3220: Direct Payment Procedures?
Use the Direct Pay form
Use the Non-Catalog item option
STOP Email the HokieMart Help Desk
Virginia Tech Procurement Department
Decision Tree: Which HokieMart Form Should I Use?
Version 1.02
Revised 04-19-13

Hosted Catalogs

HokieMart Will Deliver OR User Will Deliver

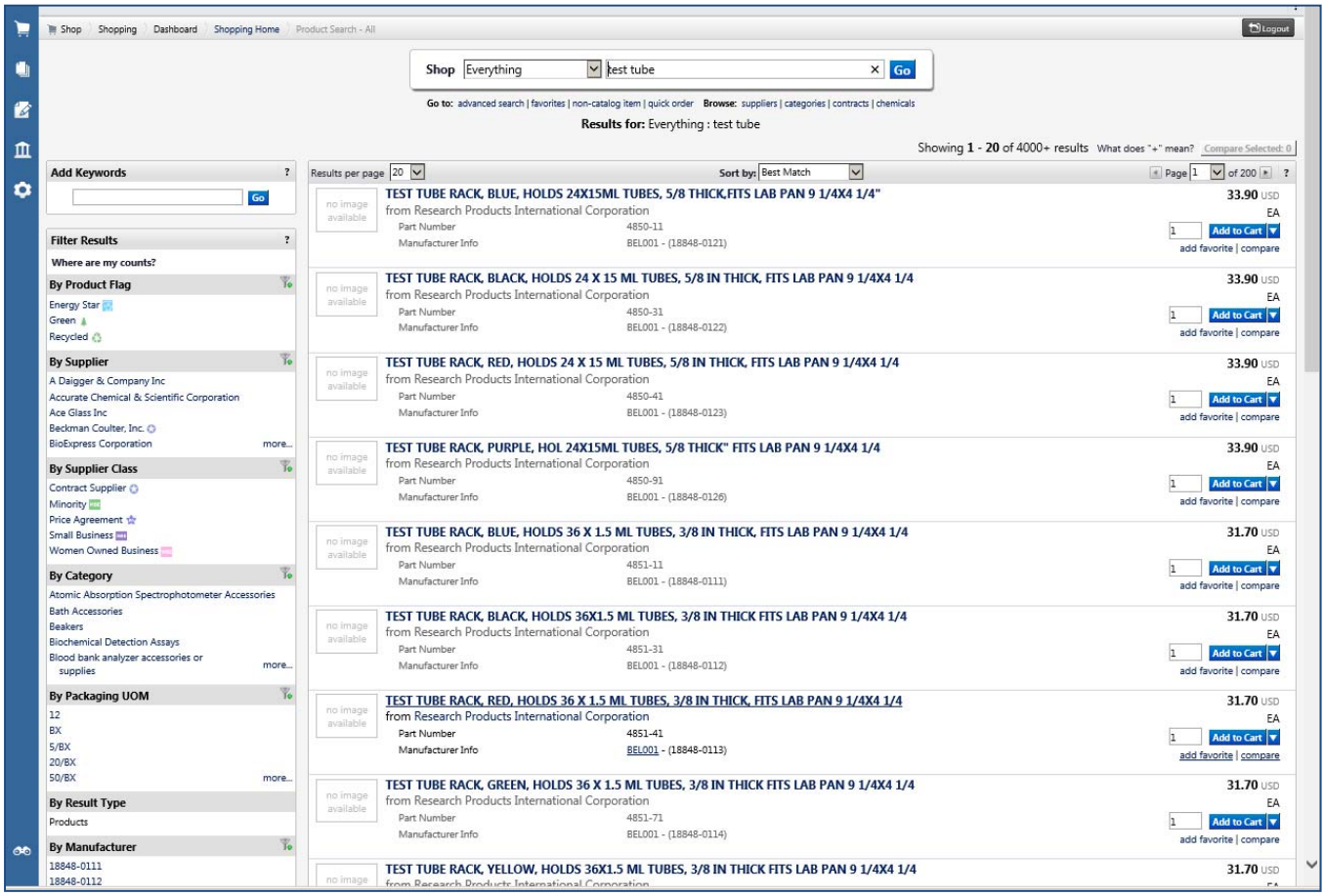
Hosted Catalogs allow users to search for a particular item. By using the simple Search feature, type the description of the item you wish to purchase. An Advanced Search is also available.

To use the simple search feature from Main Screen of HokieMart:

- Place the cursor in the "Shop Everything" field located in the upper 1/3 of the screen.
- Enter an item description (for example "test tube"):

- Click "Go."

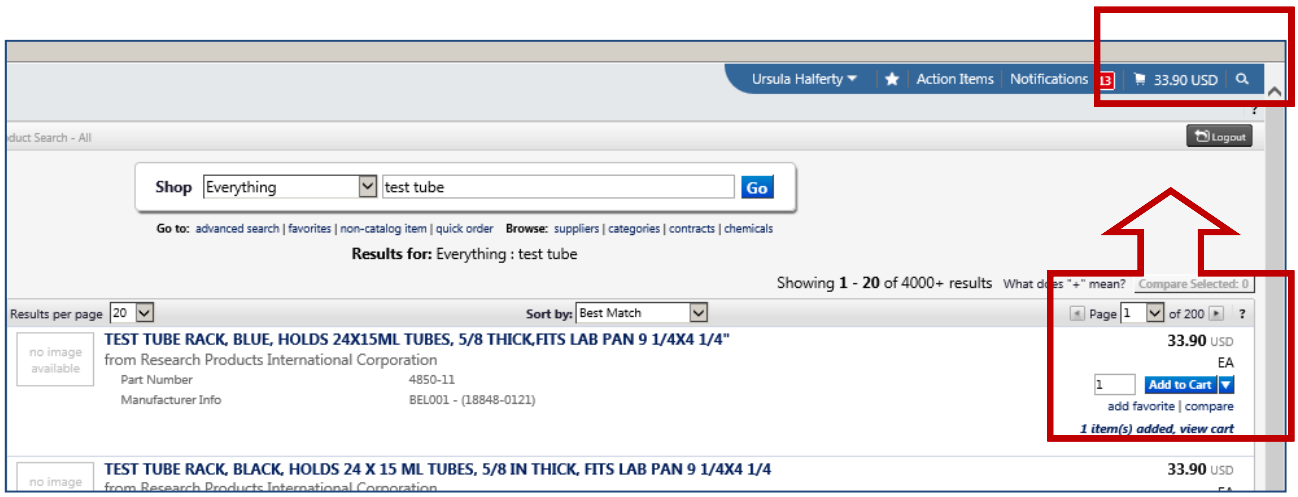
The requested search information will be displayed.


Shop
Everything
test tube
Go
Results for: Everything : test tube
Showing 1 - 20 of 4000+ results
TEST TUBE RACK, BLUE, HOLDS 24X15ML TUBES, 5/8 THICK,FITS LAB PAN 9 1/4X4 1/4"
TEST TUBE RACK, BLACK, HOLDS 24 X 15 ML TUBES, 5/8 IN THICK, FITS LAB PAN 9 1/4X4 1/4
TEST TUBE RACK, RED, HOLDS 24 X 15 ML TUBES, 5/8 IN THICK, FITS LAB PAN 9 1/4X4 1/4
TEST TUBE RACK, PURPLE, HOL 24X15ML TUBES, 5/8 THICK" FITS LAB PAN 9 1/4X4 1/4
TEST TUBE RACK, BLUE, HOLDS 36 X 1.5 ML TUBES, 3/8 IN THICK, FITS LAB PAN 9 1/4X4 1/4
TEST TUBE RACK, BLACK, HOLDS 36X1.5 ML TUBES, 3/8 IN THICK FITS LAB PAN 9 1/4X4 1/4
TEST TUBE RACK, RED, HOLDS 36 X 1.5 ML TUBES, 3/8 IN THICK, FITS LAB PAN 9 1/4X4 1/4
TEST TUBE RACK, GREEN, HOLDS 36 X 1.5 ML TUBES, 3/8 IN THICK FITS LAB PAN 9 1/4X4 1/4
TEST TUBE RACK, YELLOW, HOLDS 36X1.5 ML TUBES, 3/8 IN THICK FITS LAB PAN 9 1/4X4 1/4

- Scroll down to view all item options. Select item and enter quantity.

To place item(s) in the cart:

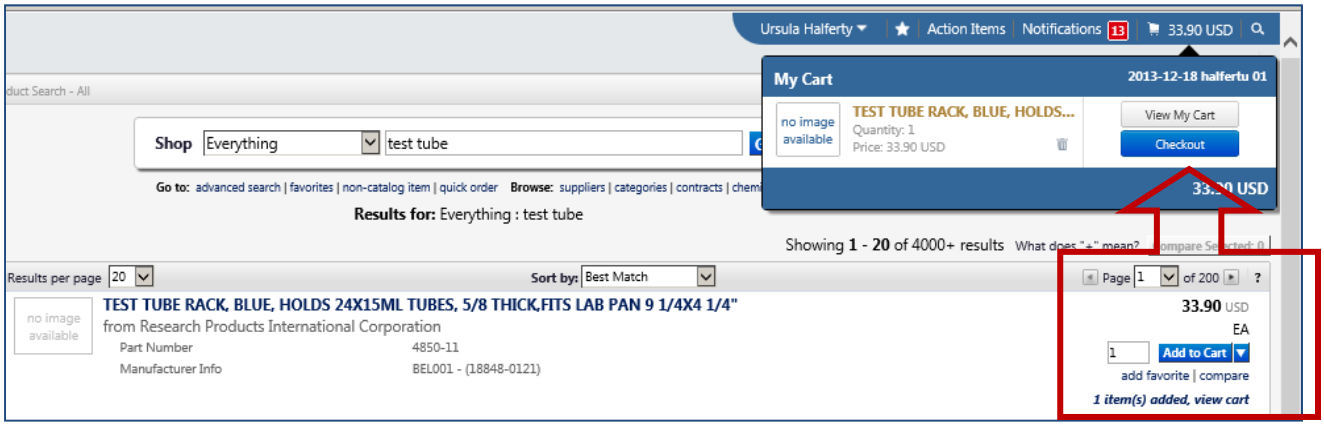
- Verify quantity
- Select option: “Add to Cart”


1 item(s) added, view cart
Ursula Halferty
Action Items
Notifications
33.90 USD
Shop
Everything
test tube
Go
Go to: advanced search | favorites | non-catalog item | quick order
Browse: suppliers | categories | contracts | chemicals
Results for: Everything : test tube
Showing 1 - 20 of 4000+ results
Compare Selected: 0
Results per page 20
Sort by: Best Match
Page 1 of 200
TEST TUBE RACK, BLUE, HOLDS 24X15ML TUBES, 5/8 THICK,FITS LAB PAN 9 1/4X4 1/4"
from Research Products International Corporation
Part Number 4850-11
Manufacturer Info BEL001 - (18848-0121)
33.90 USD
EA
Add to Cart
add favorite | compare
1 item(s) added, view cart
TEST TUBE RACK, BLACK, HOLDS 24 X 15 ML TUBES, 5/8 IN THICK, FITS LAB PAN 9 1/4X4 1/4
33.90 USD

User also has the capability to add item to favorites by clicking “add favorites” at this point.

User has now created a **Cart – Draft Requisition**.

- View My Cart allows the user to view the cart and continue shopping.
- Checkout will take the user directly to Purchase Requisition summary screen, where the fund information can be entered to complete the PR.



- When ready complete the PR.

Punchout Vendors

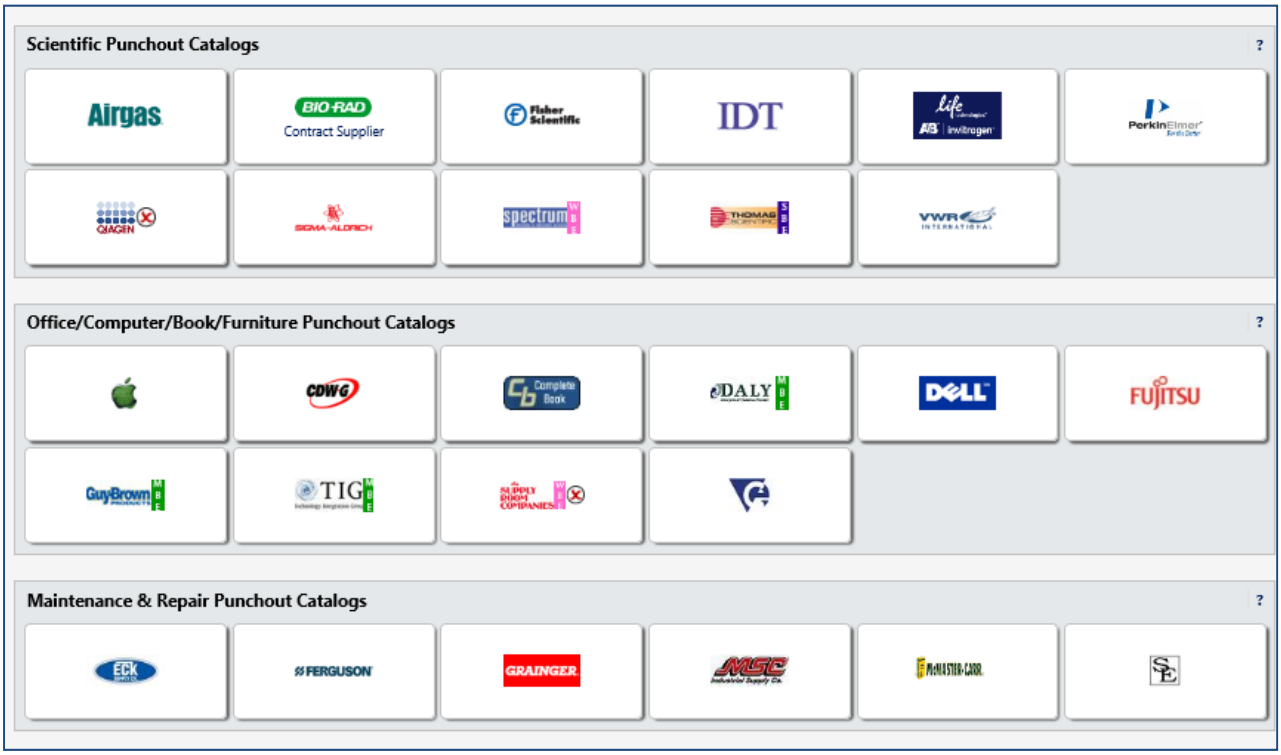
HokieMart Will Deliver OR User Will Deliver

Punchout suppliers should be used whenever possible (with the exception of University Forms). Punchouts have unlimited departmental purchasing authority EXCEPT for computer supplies when the order exceeds $20,000.

Computer orders equal to or over $20,000 will be directed to and processed by Computer Purchasing. Computer Purchasing handles processing of requisitions for computer equipment, software, maintenance, and service. For more information related to this topic see **http://www2.ita.vt.edu/purchasing/index.html**

From the Main Screen of HokieMart:

- Click desired **Punchout** supplier.



Users will be directed to the supplier's website. When searching for items, the dollar value displayed will be the contract/discounted price. All of the Punchouts are similar, **but they are each a bit different in how items are placed into the shopping cart.**

In the HokieMart Punchout section:

- Locate and select the supplier you wish to purchase from by selecting and clicking on the logo.
- Navigate within the Punchout to place orders in shopping cart.
- Complete the order.

User will now be in the **Cart – Draft Requisition**.

- Complete the PR.

Tips:

- **External Notes/Attachments features cannot be used with Punchout PO's**.
- **User may NOT copy a cart.**
- **After returning to the cart, user may NOT add or delete items in the cart of the Punchout.**
- **User may NOT Copy the Cart.**

Non-Catalog Item

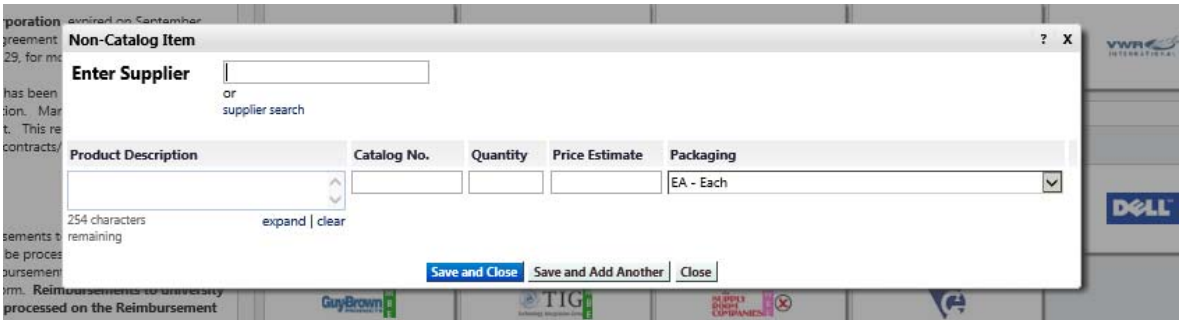
HokieMart Will Deliver OR User Will Deliver

The Non-Catalog Item form allows users to purchase items that cannot be handled through the Hosted Catalog, Punchouts, Direct Pay or Reimbursement Request form.

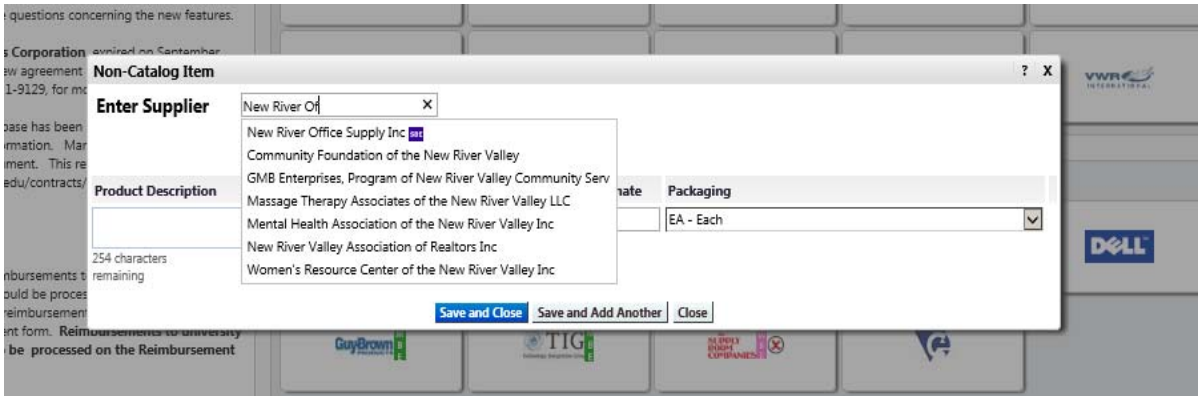
Located in the upper third section of the Main Screen of HokieMart:

- Click "non-catalog item."
- Begin typing "Supplier Name".
- Select desired supplier.

A search box will be displayed allowing users to search for a particular supplier.



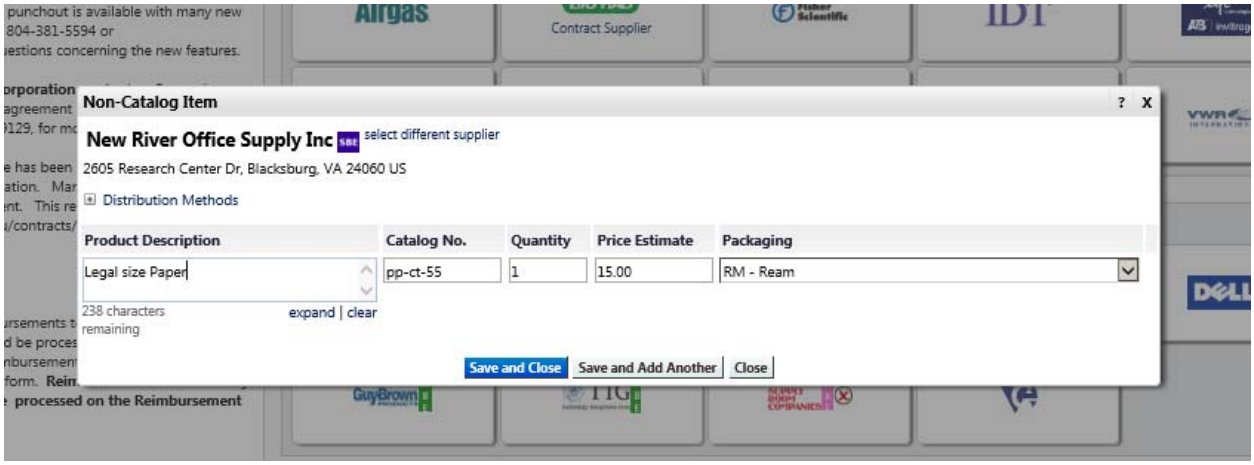
Begin entering a specific vendor. As the name is entered, possible matches will be displayed.


Non-Catalog Item
Enter Supplier
New River Of
New River Office Supply Inc
Community Foundation of the New River Valley
GMB Enterprises, Program of New River Valley Community Serv
Massage Therapy Associates of the New River Valley LLC
Mental Health Association of the New River Valley Inc
New River Valley Association of Realtors Inc
Women's Resource Center of the New River Valley Inc
Product Description
Packaging
EA - Each
254 characters remaining
Save and Close
Save and Add Another
Close

- Select the desired supplier.

Next:

- Enter Product/Description of the item(s) being purchased.
- Enter Catalog No. when available.
- Enter desired Quantity (cannot be zero - **0**).
- Enter a Price Estimate for the item(s). A dollar amount must be provided.
- From the drop-down menu, choose Packaging option if known (EA, FT, BG, etc.).



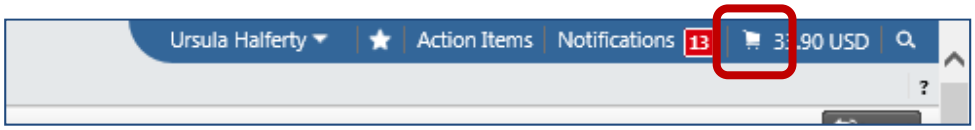
When only one item is to be ordered,

- Click “Save and Close”.
- User will now be in the Home Screen of HokieMart.
- Click on the shopping cart icon in the upper right-hand corner or select the Carts tab.

If multiple items are being ordered from the same vendor,

- Click “Save and Add Another” after adding each item.

- When finished shopping click “Save and Close”.
- User will now be in the Main Screen of HokieMart.
- Click on the shopping cart icon in the upper right-hand corner of the screen to access the draft cart.



- User will now have the option to
  - view the cart and continue shopping or
  - go directly to the Requisition Summary screen which allows the requester to add funding information in the Cart Draft Requisition.
- Complete the PR.

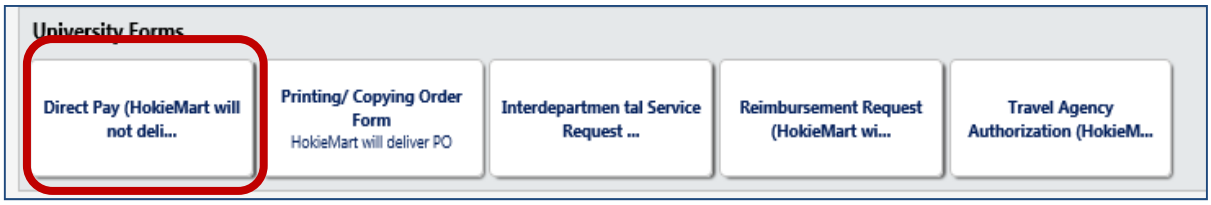
Direct Pay

HokieMart will not deliver PO

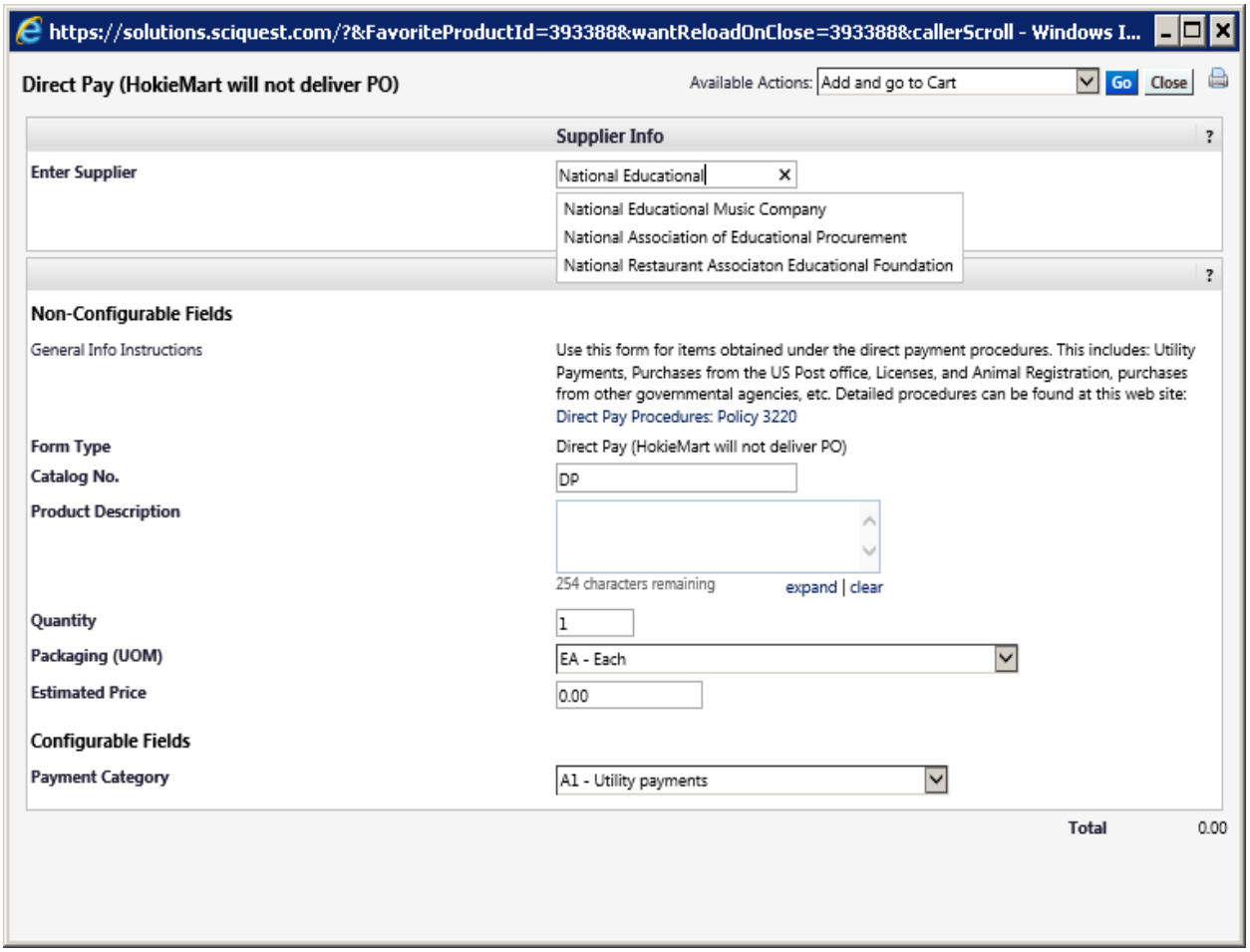
Direct Pay is used only for item(s) explicitly listed on the Direct Pay Policy - University Policy 3220. A copy is included immediately following these instructions. If you have questions about applying this policy to HokieMart purchases, please contact **hokiemart@vt.edu** or the HokieMart helpline at 231-2020 **before** processing a Direct Pay.

From Main Screen of HokieMart:

- Click "Direct Pay."


University Forms
Direct Pay (HokieMart will not deli...
Printing/ Copying Order Form
HokieMart will deliver PO
Interdepartmen tal Service Request ...
Reimbursement Request (HokieMart wi...
Travel Agency Authorization (HokieM...

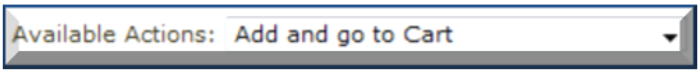
- Begin typing "Supplier Name".
- Select desired supplier.



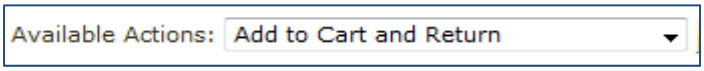
Complete the “General Info” section of the form. (All fields are required.)

- Catalog No. - should display DP and should not be edited.
- Product description - allows the user to identify and enter what is being paid.
- Quantity - leave at 1. This is one payment.
- Packaging - most often will remain "Each".
- Estimated Price – the requestor should be in possession of an invoice or bill showing the total cost.
- Payment Category may be selected from the Payment Category drop-down list.

- When complete, from the drop-down list on the top of the screen, click “Add and go to Cart”.



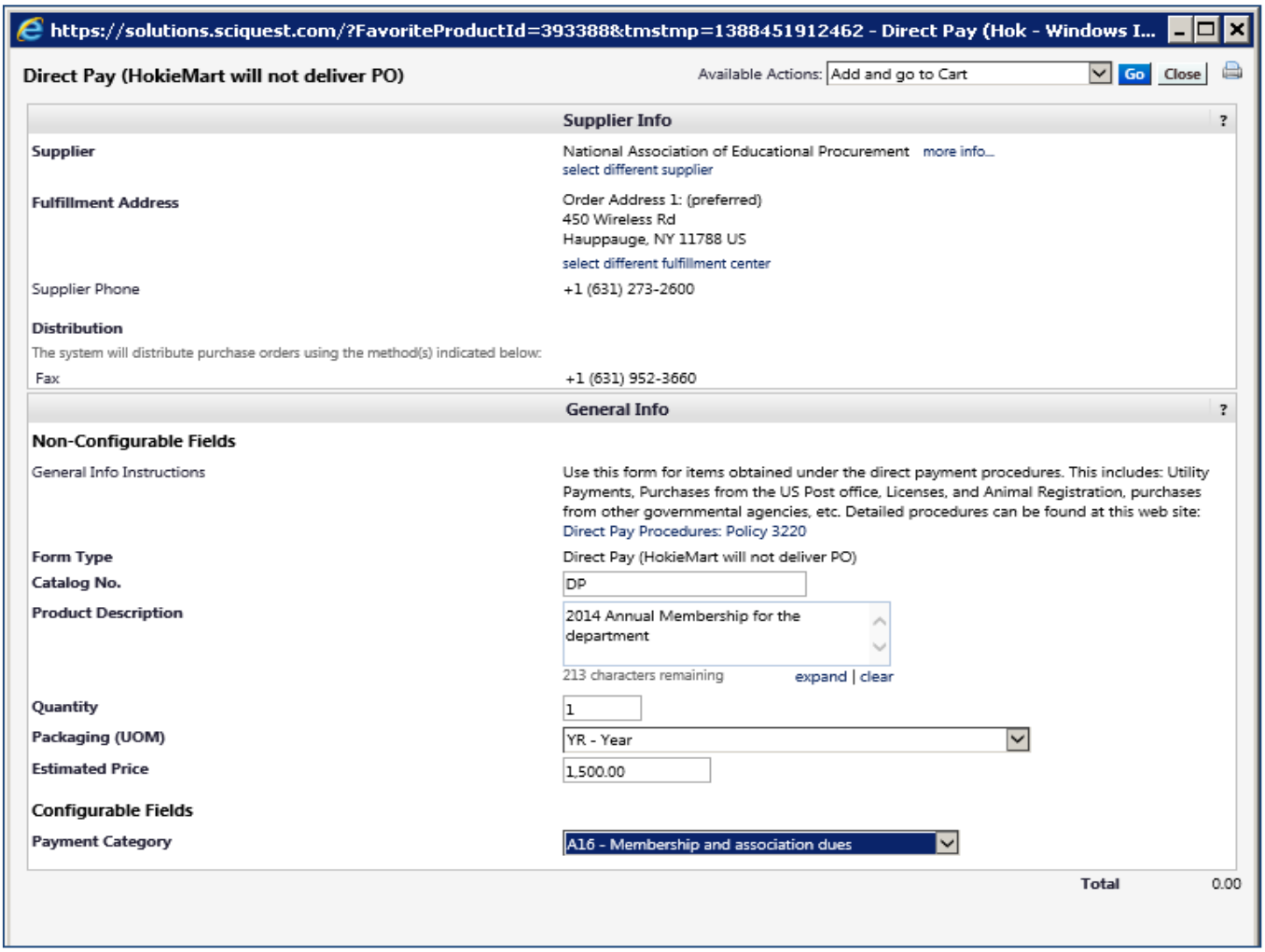
- If additional items are to be ordered from the same vendor, click “Add to Cart and Return”. This will provide the user with the option to add additional items to the cart.



- User has now created a **Cart – Draft Requisition.**
- When finished shopping click “Save and Close”.
- Click on the shopping cart icon in the upper right-hand corner of the screen to access the draft cart.
- User will now be in the Main Screen of HokieMart.
- User will now be in the Cart – Draft Requisition.
- Complete the PR.

Direct Pay (example)

HokieMart will not deliver PO

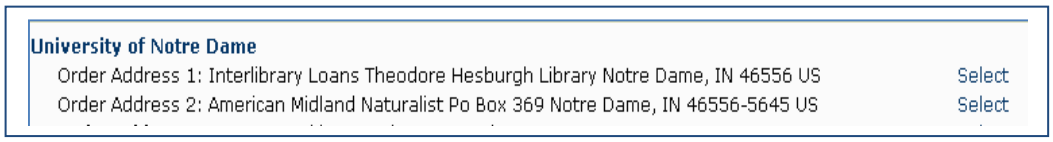

https://solutions.sciquest.com/?FavoriteProductId=393388&tmstmp=1388451912462 - Direct Pay (Hok - Windows I...
Direct Pay (HokieMart will not deliver PO)
Available Actions: Add and go to Cart
Go
Close
Supplier Info
Supplier
National Association of Educational Procurement more info...
select different supplier
Fulfillment Address
Order Address 1: (preferred)
450 Wireless Rd
Hauppauge, NY 11788 US
select different fulfillment center
Supplier Phone
+1 (631) 273-2600
Distribution
The system will distribute purchase orders using the method(s) indicated below:
Fax
+1 (631) 952-3660
General Info
Non-Configurable Fields
General Info Instructions
Use this form for items obtained under the direct payment procedures. This includes: Utility Payments, Purchases from the US Post office, Licenses, and Animal Registration, purchases from other governmental agencies, etc. Detailed procedures can be found at this web site:
Direct Pay Procedures: Policy 3220
Form Type
Direct Pay (HokieMart will not deliver PO)
Catalog No.
DP
Product Description
2014 Annual Membership for the department
213 characters remaining
expand | clear
Quantity
1
Packaging (UOM)
YR - Year
Estimated Price
1,500.00
Configurable Fields
Payment Category
A16 - Membership and association dues
Total
0.00

Direct Pay Tips

Memberships and Association Dues	Payment Category A16 Account Code 12210
Processing Payments to Other State Agencies	Payment Category A6 Account Code 12440
Payment to the U. S. Immigration and Naturalization Service	Payment Category A6 Account Code 12472
Purchasing Pitney Bowes Postage	Payment Category A2

Direct Pay New Supplier

A new supplier remittance address is not required for Direct Pay because these POs are not delivered to the supplier. Please select the default order address (**bolded address**).


University of Notre Dame
Order Address 1: Interlibrary Loans Theodore Hesburgh Library Notre Dame, IN 46556 US
Select
Order Address 2: American Midland Naturalist Po Box 369 Notre Dame, IN 46556-5645 US
Select

Virginia Polytechnic Institute and State University **No. 3220 Rev.: 11**
Policy and Procedures **Date: March 7, 2014**

Subject: Direct Payment Procedures

1. Purpose 1
2. Guidelines.....1
3. Procedures 1
4. Approval and Revisions.....4

1. Purpose

To speed the administrative processing of certain payment transactions and to reduce the number of forms needed to complete these transactions, the direct pay procedure may be followed.

2. Guidelines

Some payment transactions, due to the simplicity of their nature, can be processed in an expedited manner. Also, there is a group of purchases that does not require competition and/or are not subject to state or university purchasing regulations. Payment may be made directly to the supplier. It is the intent of the Office of the University Controller and the Purchasing Department to maximize the use of this procedure to reduce administrative processing time and cost at all levels.

3. Procedures

Financial Transactions. The items listed below may be paid directly to the payee with a Direct Pay, Reimbursement Request, a Travel and Meal Expense Voucher, or a Revenue Refund Form. These items are financial transactions and are not subject to purchasing regulations. Invoices should be sent directly to the Controller's Office (mail code 0312) for payment processing.

Payment Type	Form
Individual travel and Business Meals Reimbursement expenses	Travel and Meal Expense Voucher Reimbursement Request
Revenue refunds	Revenue Refund Form
Disability; Employee Suggestion Awards; Late Fees; Payroll Deductions; Property Rental; Scholarships, Fellowships, and Stipends; Research Project Participants (subjects); Treasury Board; and Unemployment compensation payments.	Direct Pay

Direct Pay Purchases. The following list of transactions can be enacted without competition and can be processed for payment in an expedited manner. Within the HokieMart, prepare a Direct Pay Form for all transactions conforming to the guidelines listed below, and enter the Payment Category Code using the item numbers below (i.e., A1 for utility payments, etc.). The HokieMart is not programmed to send a copy of the direct pay purchase order to the supplier. If the invoice was received at the Department, annotate the PO number and send the invoice to the Controller's Office (mail code 0312) for payment processing.
eVA. Some transaction categories are required to be transmitted to the state's e-procurement system (eVA) and some are exempt. Transaction categories are marked accordingly. Transactions that are required to flow to eVA should be enacted with eVA-registered vendors if at all possible to avoid paying additional fees.

A. Items with no dollar value limitation

1. Utility payments (eVA exempt)
2. Purchases from the US Post Office (eVA exempt)
3. Licenses (Federal, state or local) excluding software licenses (eVA exempt)
4. Animal registrations (eVA transaction)
5. Payment to vendor for meals and lodging provided to invited guest, e.g. speaker or interviewee. Individual meals and lodging subject to current travel regulation limits. (eVA exempt)
6. Purchases from other governmental and public entities (Foreign, Federal, State, local, town, city, state colleges and universities, authorities, public boards and state hospitals) (eVA exempt)
7. Livestock (domestic farm animals such as horses, sheep, pigs, chickens, cows, bulls, goats, etc.) (eVA transaction)
8. Credit card charges for gasoline and other emergency charges while in a transit status (eVA exempt)
9. Legal services, expert witness or other services associated with litigation or regulatory proceedings approved or obtained by the University Legal Counsel (eVA transaction)
10. Legal settlements approved by the University Legal Counsel (eVA transaction)
11. Lodging and/or meeting rooms in Hotels, Conference Centers, 4-H Centers, etc. excluding charges for additional services (see Item E(4) for valuation limit and definition of additional services). (eVA exempt)
12. Employee moving and relocation expenses being paid to moving companies. Refer to University Procedure 20345: Moving and Relocation. (eVA transaction)
13. Group travel arrangements in foreign countries. May include cost of transportation, lodging, meals and special services. (eVA exempt)
14. Royalties/broadcast rights and film rentals from the producer or protected distributors (eVA transaction)
15. Payments made to private educational institutions for transactions not associated with a sponsored research sub-award (eVA exempt)
16. Membership and Association dues including related assessments. Accreditation fees. (eVA exempt)
17. University participation in intercollegiate athletic tournaments and events including team travel, meals and lodging, registration, Bowl insurance, and tournament fees (eVA exempt)
18. Referees, Officials and Umpires for intercollegiate athletic events (eVA exempt)
19. Honoraria, fees for performing artists, speakers, lecturers, musicians, writers, and artists. For honoraria payments over $500, the faculty sponsor should submit a note of justification. No honoraria, speaker fees or other payments can be made under this provision to any Virginia Tech employee in any amount. (eVA exempt)

B. Items with a valuation limit of $2,000

1. Reimbursements to university employees for goods or services purchased at personal expense for use by the university, not to exceed $2,000 per reimbursement. Itemized receipts are required. Personal use items, gifts and entertainment are not eligible for reimbursement from state funds. Travel-related expenses (meals, car rental, lodging, etc.) should be reimbursed under travel procedures. NOTE: Reimbursement requests have a special form in the HokieMart. (eVA exempt)

C. Items with a valuation limit of $5,000

1. Catering Services. For policy related to catering, see university policy 3006 at ww.policies.vt.edu/3006.pdf. This policy directs consideration for the use of university catering services for events being held on campus. For policy guidance related to business meals, see Controllers Office procedures located at www.co.vt.edu/Procedures/p20310a.pdf. For current meal reimbursement rates see

www.co.vt.edu/Procedures/p20335c.html. Catered business meals may be allowed at up to 150 percent of meal reimbursement rate. Organizations should select caterers that are certified in Virginia as small, women-owned, or minority business. Organizations that make frequent use of catering firms should ensure that the yearly business volume is rotated among at least three catering firms. (eVA transaction)

D. Items with a valuation limit of $10,000

1. Freight bills/express shipping/common carriers/tariffs, import and export duties and customs brokerage fees. Refer all charges expected to exceed this amount to purchasing for competitive rate quotes. (eVA transaction) [Note: Refer to Controller's Office Procedure #20345 for information regarding common carriers used by new employees for household moving and relocation.]

E. Items with a valuation limit of $20,000

1. Medical payments for student athletes injured while participating in an intercollegiate athletic activity. Total payments to a physician per injury per athlete shall not exceed $20,000. (eVA exempt)

F. Items with a valuation limit of $50,000

1. Conference fee/course fees/seminars/training sessions/tuition and other registration fees attended by university employees and students and guests. Total university payments to a trainer should not exceed $50,000 per year under direct pay procedures. (eVA exempt)
2. Consulting and/or training services associated with academic or research programs including travel and living expenses (established University Travel Management Contract must be used where applicable). Total university payments to an individual consultant or consulting firm should not exceed $50,000 per year under direct pay procedures. (eVA transaction)
3. Advertising for employment opportunities and other announcements (all media). (eVA exempt)
4. Additional services (meals, audio-visual equipment, etc.) associated with lodging and/or meeting rooms in Hotels, Conference Centers, 4-H Centers, etc. (eVA transaction)
5. Subscriptions, books, pre-printed materials, reprints, publishers page changes, book subscriptions, book subventions, subscription mailing list (printed or electronic), pre-recorded audio and video cassettes, conference proceedings, slide presentations, tapes, CDs and diskettes, when available only from the publisher or producer. (eVA transaction)
6. Alcohol purchased from ABC stores (eVA exempt) [Note: Ability to purchase alcohol is limited to Dining Services and The Inn at Virginia Tech.]
7. Photographers (excluding graduation photographic services for which there is a university contract). (eVA transaction)
8. Academic testing services (eVA exempt)
9. Rental fees for exhibitions of historical artifacts and original works of art. Fees may include other associated charges such as transportation, freight, supplemental insurance, etc. (eVA exempt)
10. Group travel arrangements within the United States. May include cost of transportation, lodging, meals and special services. If lodging only is being obtained, use item A-11. If the group travel costs will be in excess of $50,000 paid to the same vendor, Purchasing will need to complete a Purchase Order. (eVA exempt)

Documentation. Even though university policy may not require the preparation of a purchase order for direct pay transactions, some vendors may desire this documentation in confirmation of the university's intentions. The Purchasing Department will prepare such documentation upon request and receipt of a Requisition for Purchase. More commonly, vendors will seek to have the university employee sign some form of contract for the goods or services. University Policy 3015 details contract signature authority and requires that all vendor contract documents be reviewed by University Legal Counsel prior to signature.

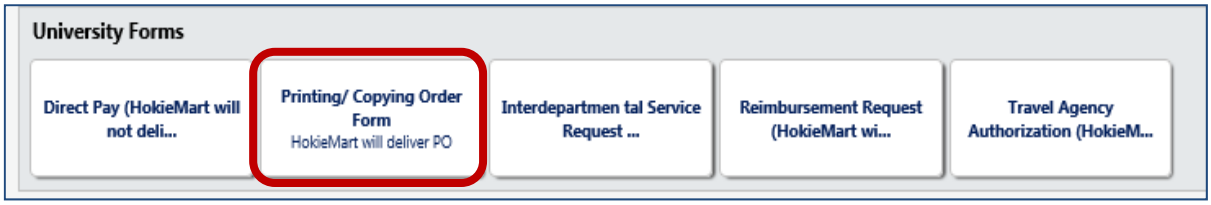
Interdepartmental Printing Request (IPR)

HokieMart will deliver PO

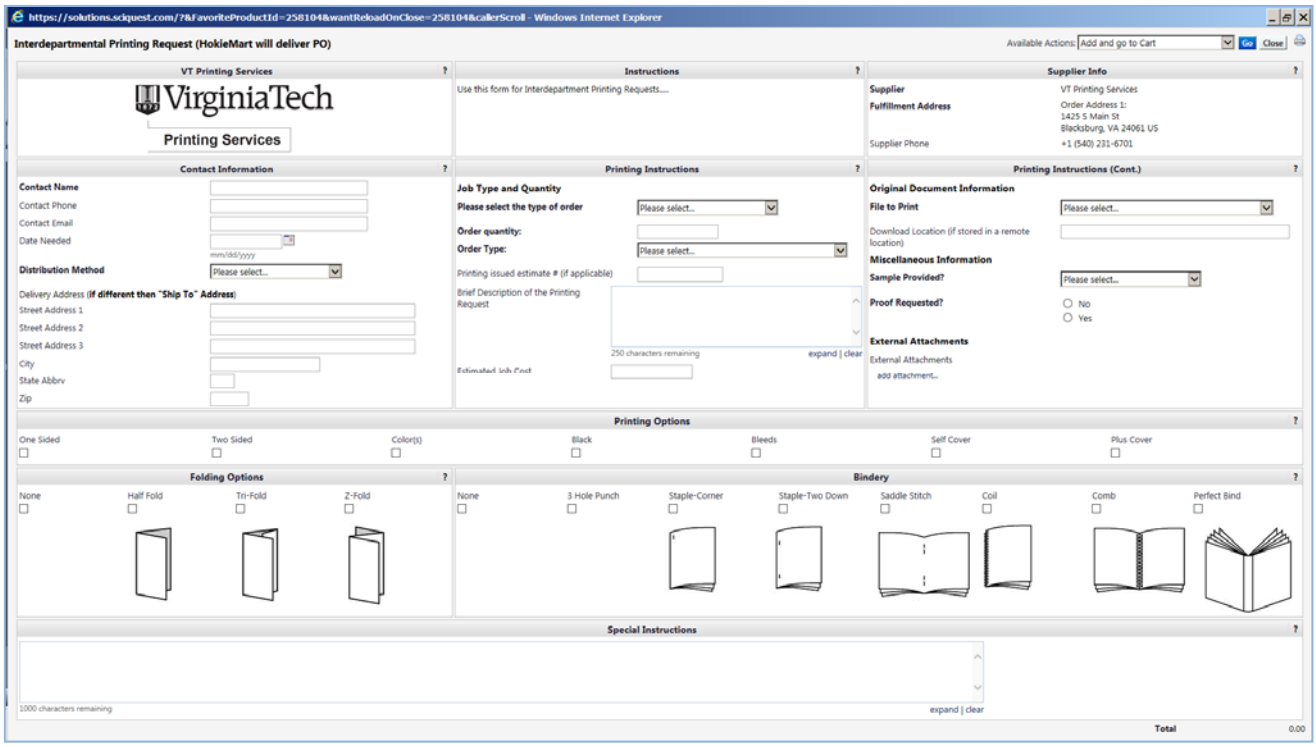
Effective July 1, 2013, the Digital Print Centers have been combined with Printing Services (PS) at the South Main Street location. HokieMart home page has been updated to reflect the change. Use the Interdepartmental Printing Request (IPR) form to process orders to the university Printing Services. The IPR button is now: Printing/ Copying Order Form button.

From the Main Screen of HokieMart:

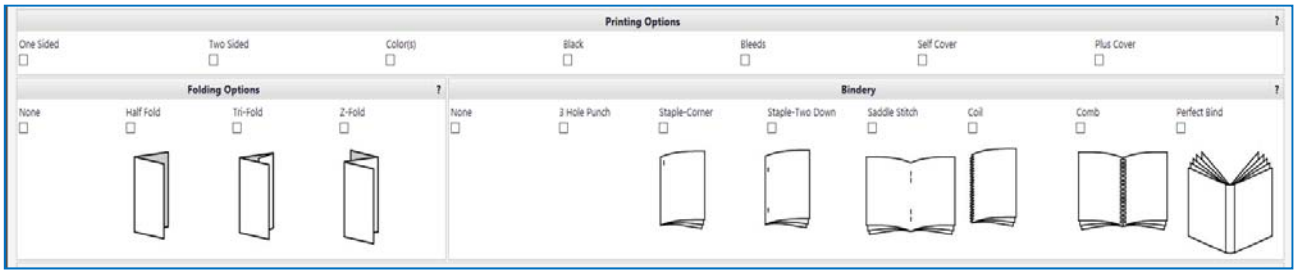
- Click "Printing / Copying Order Form button"


University Forms
Direct Pay (HokieMart will not deli...
Printing/ Copying Order Form
HokieMart will deliver PO
Interdepartmen tal Service Request ...
Reimbursement Request (HokieMart wi...
Travel Agency Authorization (HokieM...

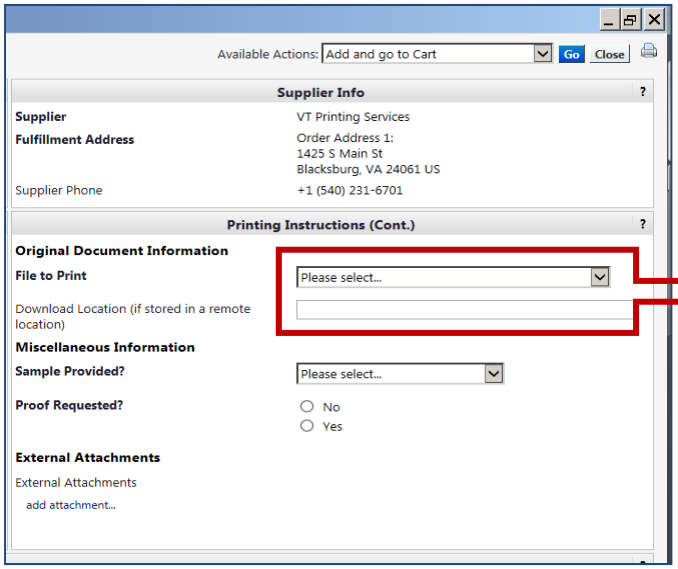
Note: PO's to the VT Centralized Mail will still be processed on the ISR form. If you have questions about the form, please contact Catherine Chambers or another PS staff member at 231-6701 or printing@vt.edu.



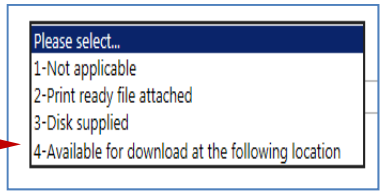
The new form is now visually based to make it easier to place orders with Printing Services.



You are no longer "forced" to attach an IPR form to the Purchase Requisition. Now you can attach your document and/or business card order from directly.



If you have an electronic file of the document to be printed you can attach under "**File to Print"** area.



To complete the IPR request from the Available Action drop-down menu at the top of the screen:

- Click "Add and go to Cart**.**"
- Click **"**Go."

User will now be in the **Cart – Draft Requisition**.

- Complete the PR as usual.

Office Campus Printing

When cost of printing services exceeds fifty dollars ($50.00) for an off-campus supplier, the IPR will be electronically routed to Printing Services for approval. Please process the IPR BEFORE using an off-campus vendor.

Account Codes

Digital Printing Service	12150
Printing Services	12152
Off Campus Printing	12156

Printing Services will provide a monthly file to the Controller's Office to charge the department's fund for the services provided. The PO encumbrance will then be liquidated.

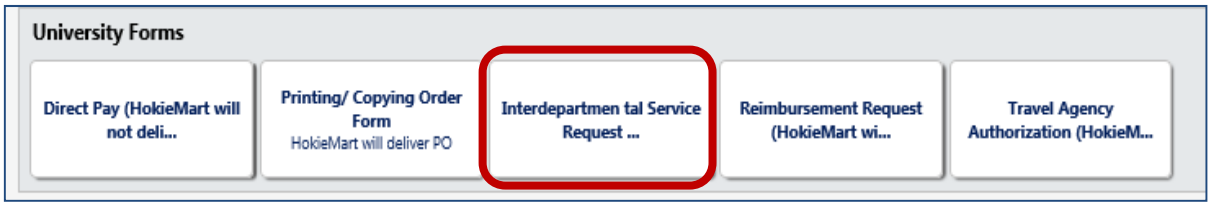
Interdepartmental Service Request (ISR)

HokieMart will deliver PO

The Interdepartmental Service Request (ISR) form is used to process orders to all university suppliers and Service Centers listed on the drop-down menu of the form. Service Centers/Suppliers are added on a continuous basis.

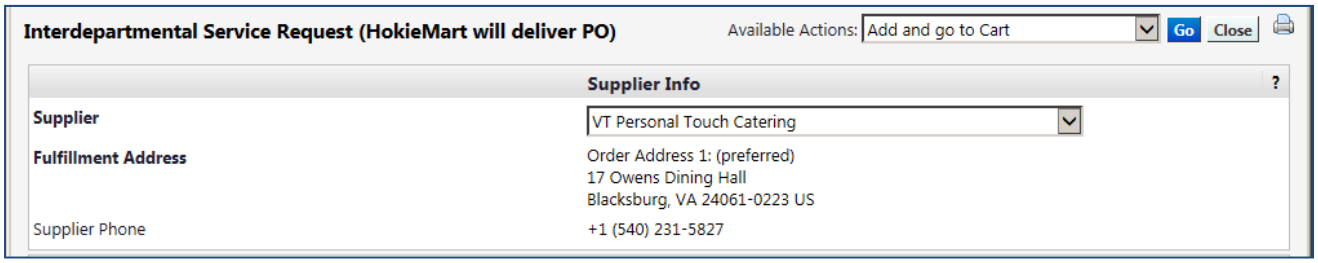
From the Main Screen of HokieMart:

- Click "Interdepartmental Service Request."


University Forms
Direct Pay (HokieMart will not deli...
Printing/ Copying Order Form
HokieMart will deliver PO
Interdepartmen tal Service Request ...
Reimbursement Request (HokieMart wi...
Travel Agency Authorization (HokieM...

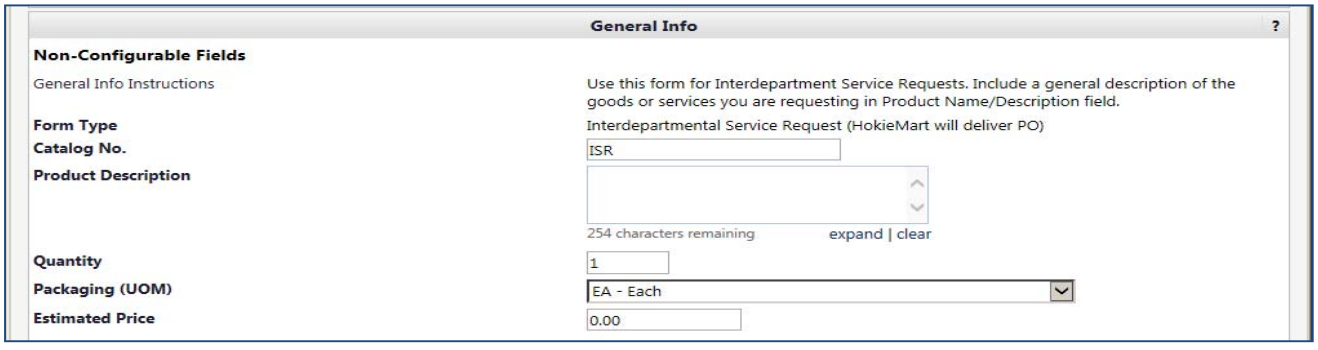
From the drop-down menu:

- Choose the desired VT supplier.
- Complete list of Virginia Tech internal university suppliers can be found at: http://www.procurement.vt.edu/HokieMart/hm.html

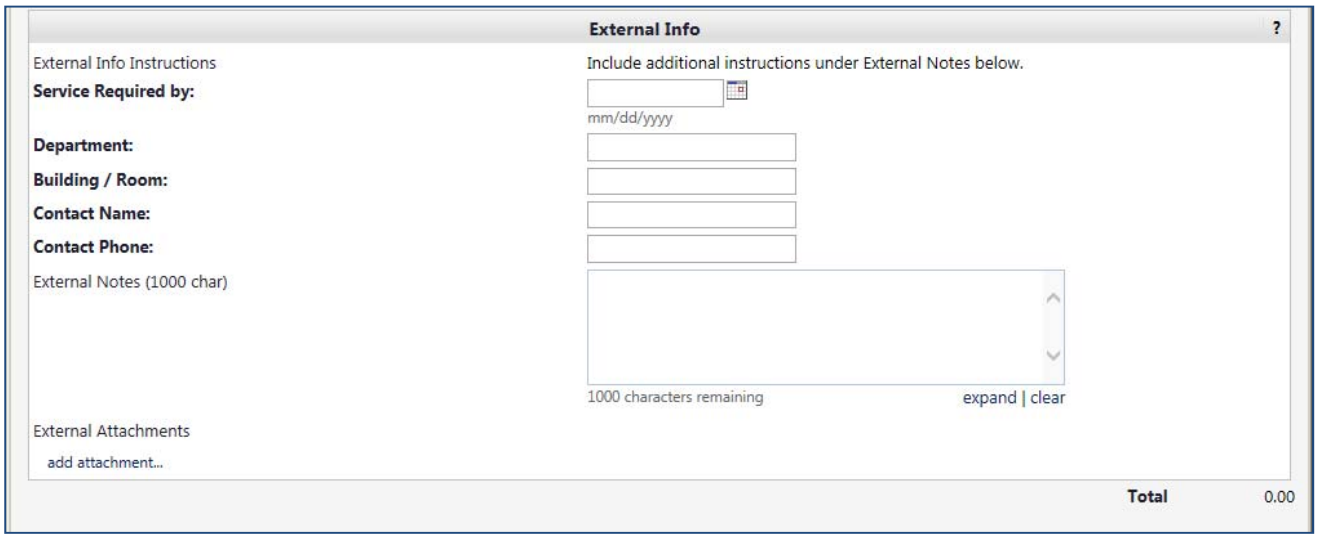


In the General Info section, enter all information.

- Catalog No. should display ISR (Do not edit)
- Product description allows the user to identify what is purchased.
- Quantity - leave at 1. This is one service request.
- Packaging defaults to "Each"
- Estimated Price…how much do you think the request will be?



Complete the "External Notes" portion of the form. If this portion is not completed, error messages will appear and the user cannot submit the PR. All areas are required.



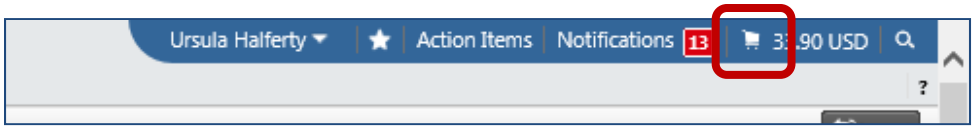
- If attachments are necessary, Click "add attachment."

Browse and attach any document(s) that need to be sent with the ISR. These attachments must be done as **External Attachments**.

- Close the attachment box. The attachment name will appear in the box.

From the Available Actions drop-down menu:

- Click "Add and go to Cart**."**
- When finished shopping click "Save and Close".
- User will now be in the Main Screen of HokieMart.
- Click on the shopping cart icon in the upper right-hand corner of the screen to access the draft cart.

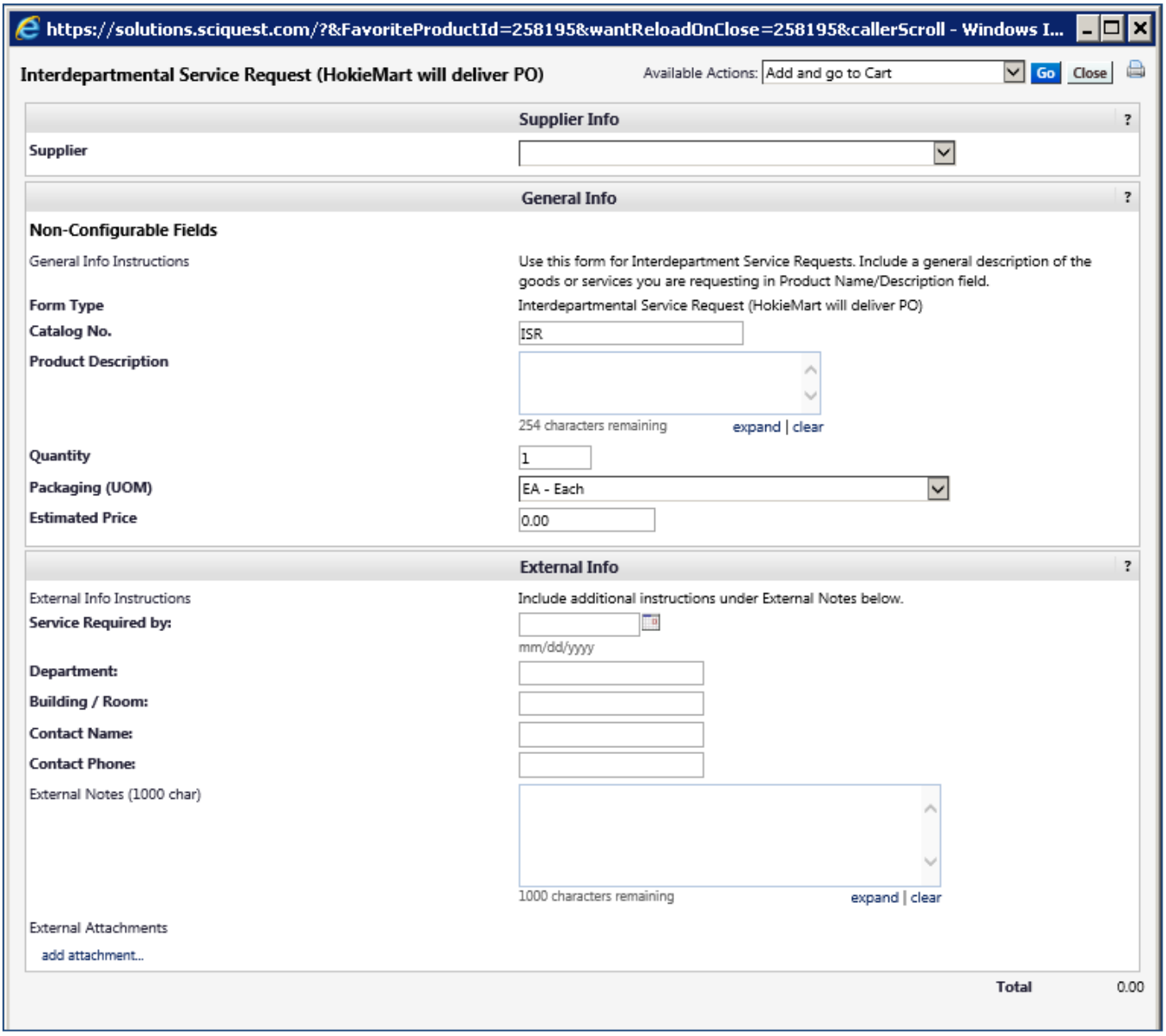


- User will now have the option to
  - view the cart and continue shopping or
  - go directly to the Requisition Summary screen which allows the requestioner to add funding information in the Cart Draft Requisition.
- Complete the PR.

Processing ISRs Through HokieMart

The Controller's Office continues the on-going process of setting up the university's internal suppliers so they can receive Interdepartmental Service Requests (ISRs) through HokieMart. If the internal vendor you are doing business with has been set up on the HokieMart ISR form, you must complete your ISRs through HokieMart. The Controller's Office will no longer process paper ISRs for these suppliers. A complete list of HokieMart internal suppliers can be found at the following link. http://www.procurement.vt.edu/HokieMart/internal_vendors.pdf**.**

With the exception of the template the ISR may be completed in the same manner as the IPR.



Account Codes for ISRs

When entering ISRs for suppliers in HokieMart who are official University Service Centers, The account code on all transactions must always be **1244R**. If an account code other than **1244R** is entered on the ISR, the PO that was generated will be closed and you will be asked to process a new request through HokieMart with the correct account code. A complete list of official University Service Center HokieMart Suppliers can be found at the following link:
http://www.procurement.vt.edu/HokieMart/service_ctrs.pdf

Receiving ISRs

Also, please note that departments submitting ISRs to any Internal Service Unit through HokieMart **do not need to do receiving in HokieMart** or send a paper copy of the purchase order to the Controller's Office. The individual service area will process the billings through Banner.

If you have questions, please contact Stacy King at 231-8624 or at **kings@vt.edu**.

Processing ISRs for The Inn at Virginia Tech

When using university funds, departments will enter requests for services incurred at The Inn at Virginia Tech and Skelton Conference Center in HokieMart prior to the event/reservation. Due to the large number of POs being generated by this new payment process, The Inn requests that you include the following information on all PO requests for services.

- Event Name (HokieMart Conference, lodging for Mr. Smith, etc.)
- Event and/or Reservation Date(s)
- Departmental Contact
- Contact at The Inn
- Event Order Number(s) or guest room confirmation number(s)

Please include any additional information that would be helpful in identifying your event(s) or reservation(s) and to expedite the request.

When entering the PR in HokieMart, select the "VT The Inn at Virginia Tech and Skelton Conference Center" from the drop-down menu of the ISR. The amount of the PO may be an estimate; the actual charges will be billed directly to the department.

User may choose to process an ISR each time a service is incurred or may choose the option of entering a blanket order for the entire fiscal year. Include "blanket order" in the product description of the PR and user will perform a cost receipt each time an invoice is received.

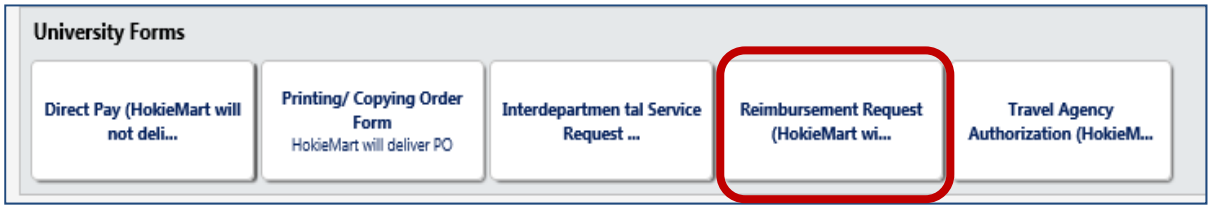
If there is an individual in your department that is not a HokieMart user but conducts business with The Inn, please inform them of this new procedure.

Reimbursement Request

HokieMart will NOT deliver PO

Use this form to reimburse Virginia Tech faculty/employees/students for non-travel items/services up to $2,000.

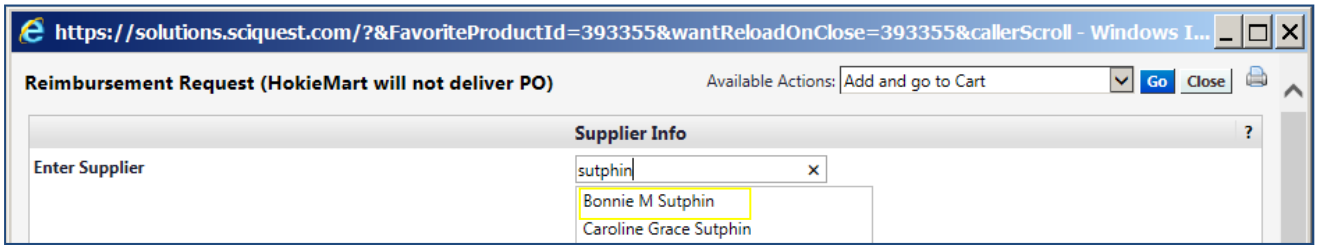
Note: **To reimbursement an individual not affiliated with Virginia Tech use the Non-Catalog form.**


University Forms
Direct Pay (HokieMart will not deli...
Printing/ Copying Order Form
HokieMart will deliver PO
Interdepartmen tal Service Request ...
Reimbursement Request (HokieMart wi...
Travel Agency Authorization (HokieM...

Entertainment and recruitment expenses in the Blacksburg area or other official station may also be processed on the Reimbursement Request form. The original Reimbursement Request form must be printed and sent to the Controller's Office for payment. Please see instructions below for additional requirements.

From the Main Screen of HokieMart:

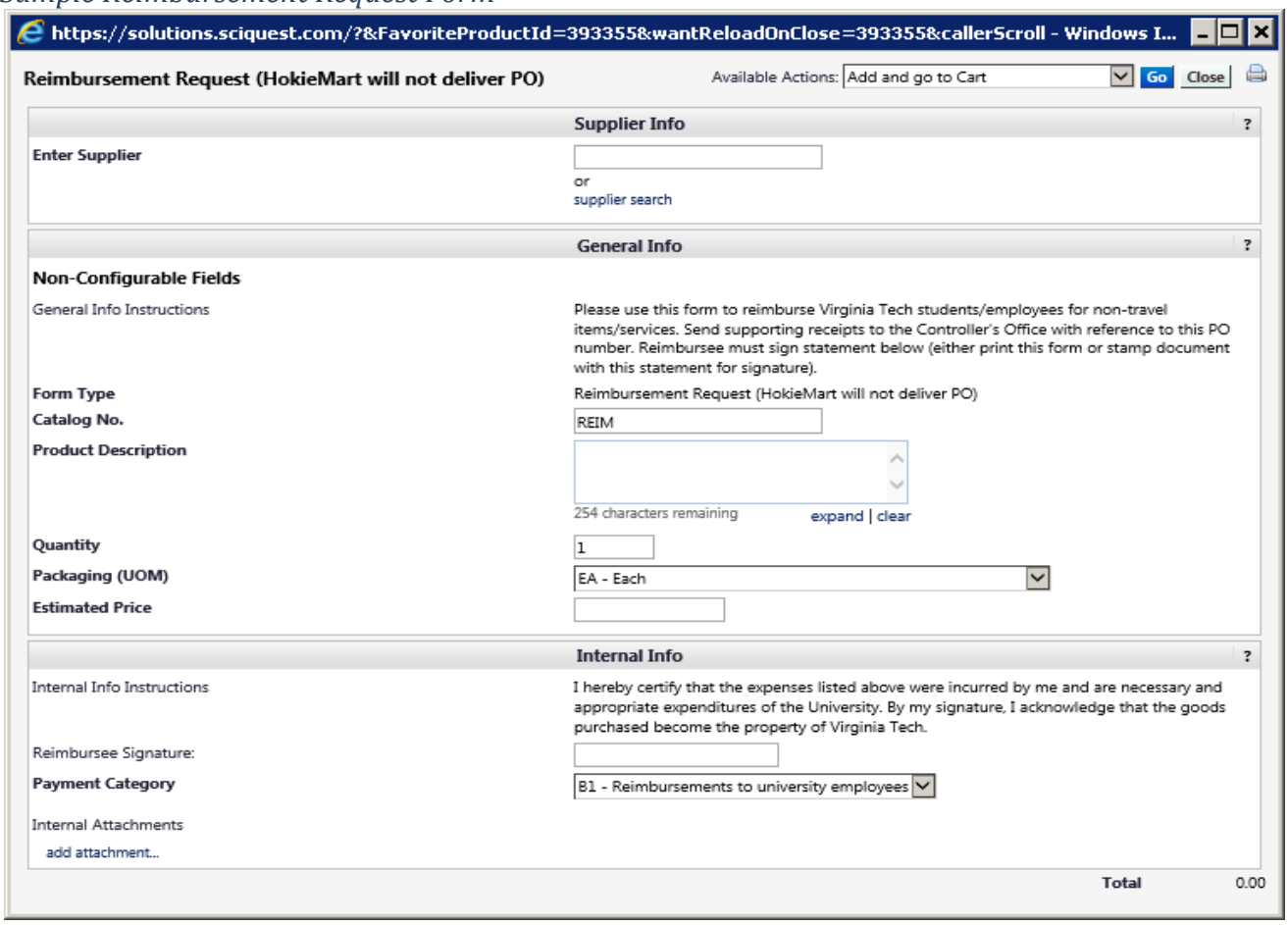
- Click "Reimbursement Request."
- Begin entering person to be reimbursed. If their name is available, it will auto populate.
- Select appropriate name from those available (reimbursee name).



Next in the "General Info" section of the form, enter required information.

- Catalog No. will be REIM. (Do not edit – this is the default code for this form)
- Product Description will be a description of the item(s) being reimbursed.
- Quantity will be 1…this is one reimbursement.
- Packaging…defaults to "Each."
- Estimated Price…receipts are necessary to process a reimbursement. Enter the actual amount total from the receipt(s).

Sample Reimbursement Request Form


https://solutions.sciquest.com/?&FavoriteProductId=393355&wantReloadOnClose=393355&callerScroll - Windows I...
Reimbursement Request (HokieMart will not deliver PO)
Available Actions: Add and go to Cart
Go
Close
Supplier Info
Enter Supplier
or
supplier search
General Info
Non-Configurable Fields
General Info Instructions
Please use this form to reimburse Virginia Tech students/employees for non-travel items/services. Send supporting receipts to the Controller's Office with reference to this PO number. Reimbursee must sign statement below (either print this form or stamp document with this statement for signature).
Form Type
Reimbursement Request (HokieMart will not deliver PO)
Catalog No.
REIM
Product Description
254 characters remaining
expand | clear
Quantity
1
Packaging (UOM)
EA - Each
Estimated Price
Internal Info
Internal Info Instructions
I hereby certify that the expenses listed above were incurred by me and are necessary and appropriate expenditures of the University. By my signature, I acknowledge that the goods purchased become the property of Virginia Tech.
Reimbursee Signature:
Payment Category
B1 - Reimbursements to university employees
Internal Attachments
add attachment...
Total
0.00

The Internal Info section has a place for the reimbursee to sign. It is suggested that you print the form **BEFORE** adding to the cart. To print, choose the printer friendly icon in the upper right of the form or click with the right mouse button.

- Print and have the reimbursee sign the form.
- Follow procedures for submitting reimbursements to the Controller's Office.

From the available action drop-down menu:

- Click "Add and go to Cart."
- Click "Go."

User will now be in the **Cart – Draft Requisition.**

- Complete the PR.

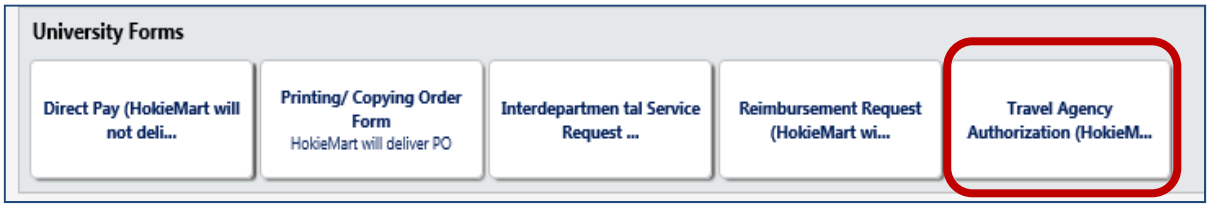
Notes:

- Attach all original receipts to the Reimbursement Form.
- Do not use staples to attach receipt; please use tape.
- Internal Notes may be attached when needed.
- Following these guidelines will allow the reimbursement to be made in a timely manner.
- Complete and detailed justification must be provided.

Travel Agency Authorization

HokieMart Will Deliver PO

Use this form to purchase airline tickets and other travel related services from contract travel agencies listed on the drop-down menu of the TAA. Do not use this form for Travel Reimbursement to university faculty or staff. See the Controller's web-site for information related to travel and travel reimbursements.


University Forms
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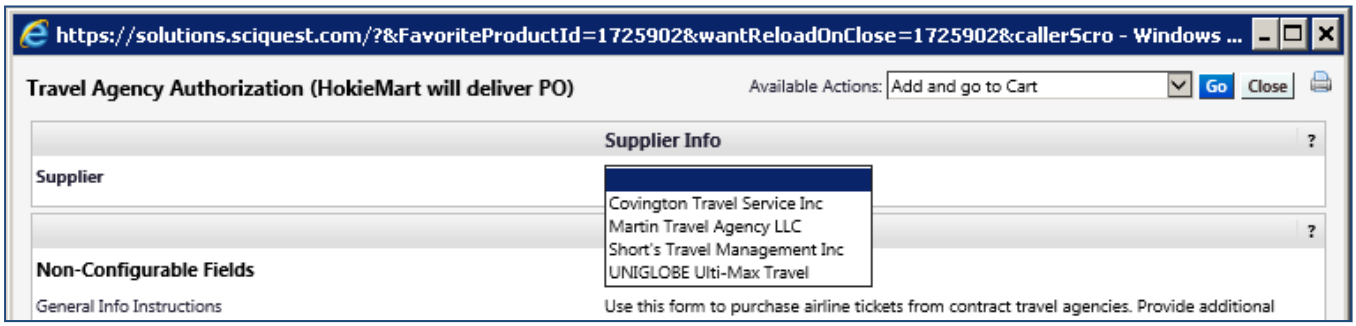
Printing/ Copying Order Form
HokieMart will deliver PO
Interdepartmen tal Service Request ...
Reimbursement Request (HokieMart wi...
Travel Agency Authorization (HokieM...

From Main Screen of HokieMart:

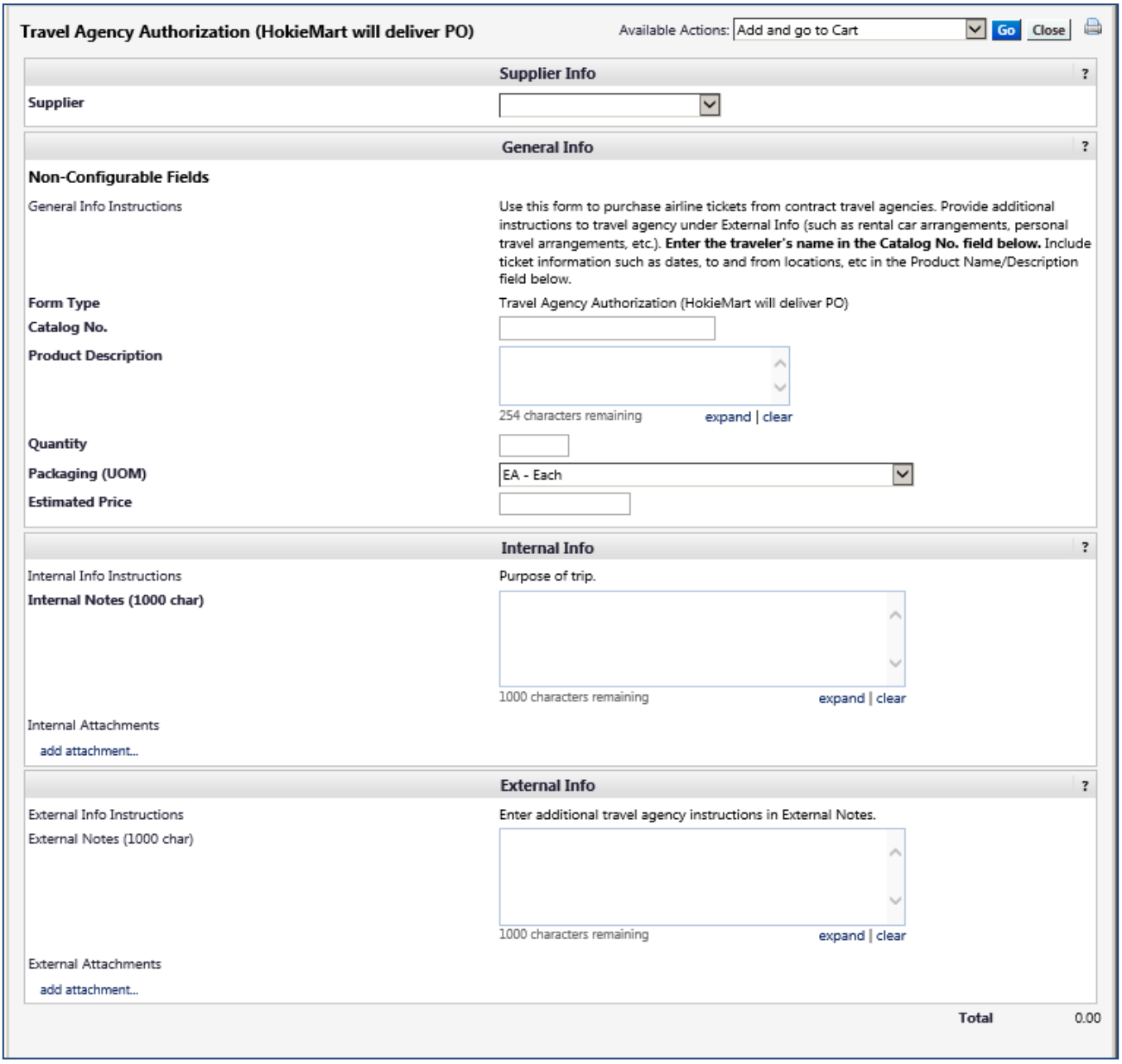
- Click "Travel Agency Authorization**.**
- From the drop-down menu choose the desired contract vendor.


https://solutions.sciquest.com/?&FavoriteProductId=1725902&wantReloadOnClose=1725902&callerScro - Windows ...
Travel Agency Authorization (HokieMart will deliver PO)
Available Actions: Add and go to Cart
Go
Close
Supplier Info
Supplier
Covington Travel Service Inc
Martin Travel Agency LLC
Short's Travel Management Inc
UNIGLOBE Ulti-Max Travel
Non-Configurable Fields
General Info Instructions
Use this form to purchase airline tickets from contract travel agencies. Provide additional

Complete the requested screen information as follows:

- Identify and located the fields in the "General Info" section of the form, enter required information
  - Catalog No. will be the traveler's name. Be sure to use legal name.
  - Product Description is the location to provide information for the travel agent. Be as specific as necessary to ensure proper travel is arranged.
  - Quantity will be 1. This will be for one traveler.
  - Packaging will remain "Each"
  - Estimated price will be for the travel and all associated costs.

Sample Travel Agency Authorization Form


Travel Agency Authorization (HokieMart will deliver PO)
Available Actions: Add and go to Cart
Go
Close
Supplier Info
Supplier
General Info
Non-Configurable Fields
General Info Instructions
Use this form to purchase airline tickets from contract travel agencies. Provide additional instructions to travel agency under External Info (such as rental car arrangements, personal travel arrangements, etc.). Enter the traveler's name in the Catalog No. field below. Include ticket information such as dates, to and from locations, etc in the Product Name/Description field below.
Form Type
Travel Agency Authorization (HokieMart will deliver PO)
Catalog No.
Product Description
254 characters remaining
expand | clear
Quantity
Packaging (UOM)
EA - Each
Estimated Price
Internal Info
Internal Info Instructions
Purpose of trip.
Internal Notes (1000 char)
1000 characters remaining
expand | clear
Internal Attachments
add attachment...
External Info
External Info Instructions
Enter additional travel agency instructions in External Notes.
External Notes (1000 char)
1000 characters remaining
expand | clear
External Attachments
add attachment...
Total
0.00

- Complete required information in the Internal and External Info section as necessary.
- Attachments may be added to Internal and External Info, if necessary.

To finalize the Travel Agency Authorization from the Available Actions drop-down menu select:

- Click "Add and go to Cart**.**"
  - Then click "Go**.**"

User will now be in the **Cart – Draft Requisition.**

- Complete the cart to create the PR.

Processing Orders In HokieMart

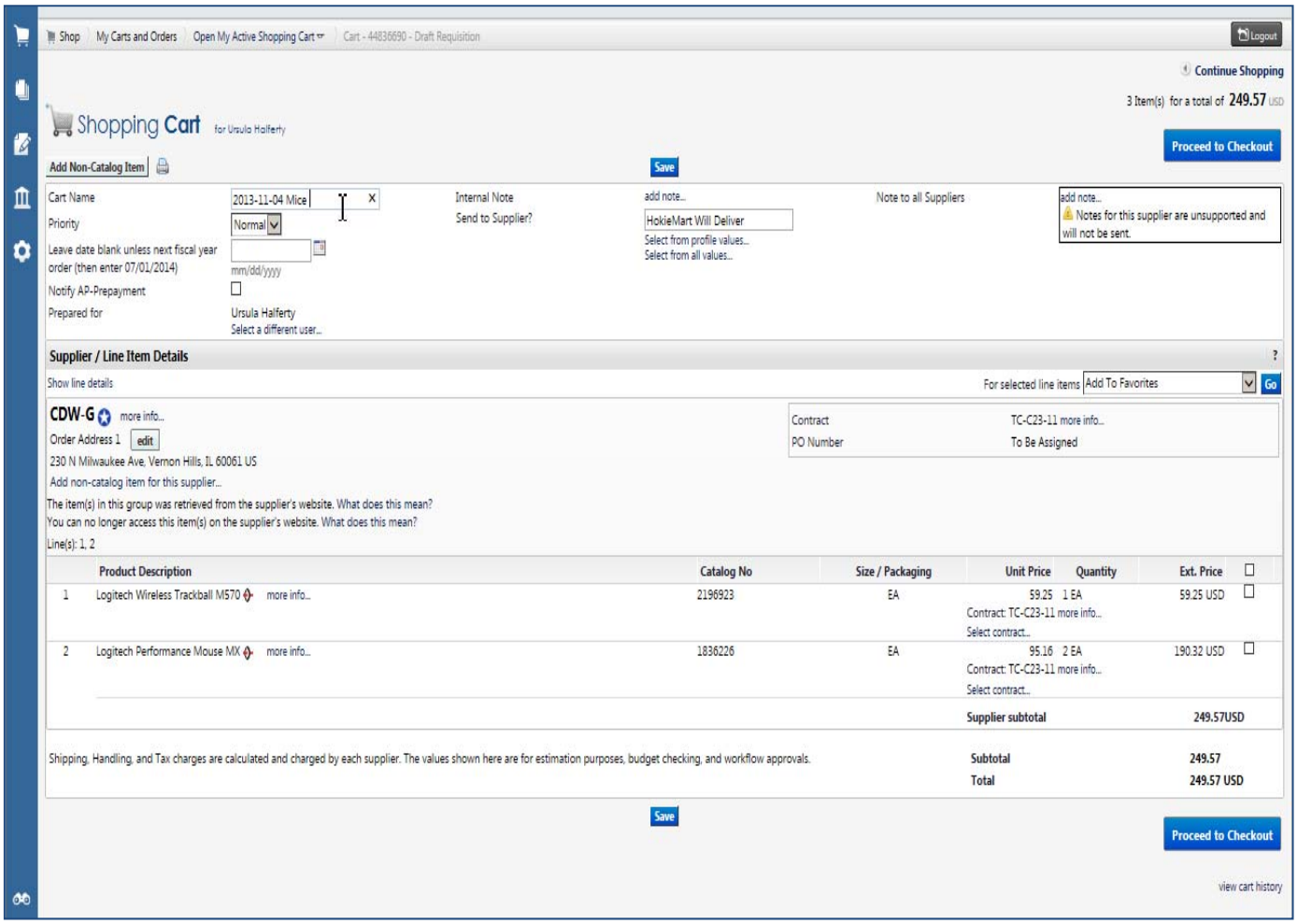
Once the requestor has determined which HokieMart screen form is required to complete the desired electronic procurement transaction, this section will outline the steps to complete the Shopping Cart and finalize the Purchase Requisition (PR).

If the requestor is unsure which form to use, refer back to the previous section **HokieMart Forms**.

Create the Cart

Choose the appropriate form from the HokieMart main screen.

- Either
  - search the Hosted Catalog, select a vendor from the Punchout, Non Catalog Item or
  - choose one of the university forms.
- Complete the HokieMart form.



- Navigate to the “Shopping Cart”

Edit the Cart

Users should now take a moment to edit (add additional information) to the shopping cart. There is a last chance to edit information during the Final Review. **Regardless of the screen form used, the information and fields required in to complete the Cart are the same.**

Cart Field Names

Cart Name - Users have the ability to give the cart a unique name. This is optional, but helpful when searching for past requisitions. If users purchase the same items frequently from the same supplier, it may be helpful to give the cart a unique name. Users can view past purchases by the cart name.

Priority - Users are able to set the priority of the PR. By default the priority will be Normal. There is a drop-down menu with the option of Urgent. Use this option ONLY when a PR is of critical importance. Most PRs will be Normal.

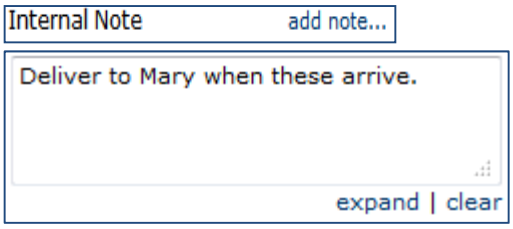
Date Field - This field should be left blank. The exception is just prior to the end of the fiscal year. At that time, users may enter the date of July 1 and current year. This will ensure the invoice will be paid out of the next fiscal year's budget.

Notify AP-Prepayment - See Prepayment Notification in this Guide for additional instructions.

Prepared For (On-Behalf-Of) - This feature is used by the On-Behalf-of Requestor. The PR is prepared for another Requestor or "Shared Department". The selection may be made here or in the Final Review. For information addition information on this topic refer to the On-Behalf-Of Requestor section.

Internal Notes - intended for department and/or university.

- Click "add note."
- Click in the box and add desired note.



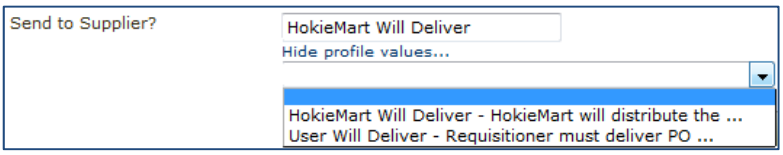
External Notes - External Notes (notes for all suppliers) may be added:

- Click "add note."
- Click in the box and add desired note.

Punchout vendors are not able to receive comments in this section.

Send to Supplier? –Verify the delivery methods

- "HokieMart Will Deliver" or
- "User Will Deliver."

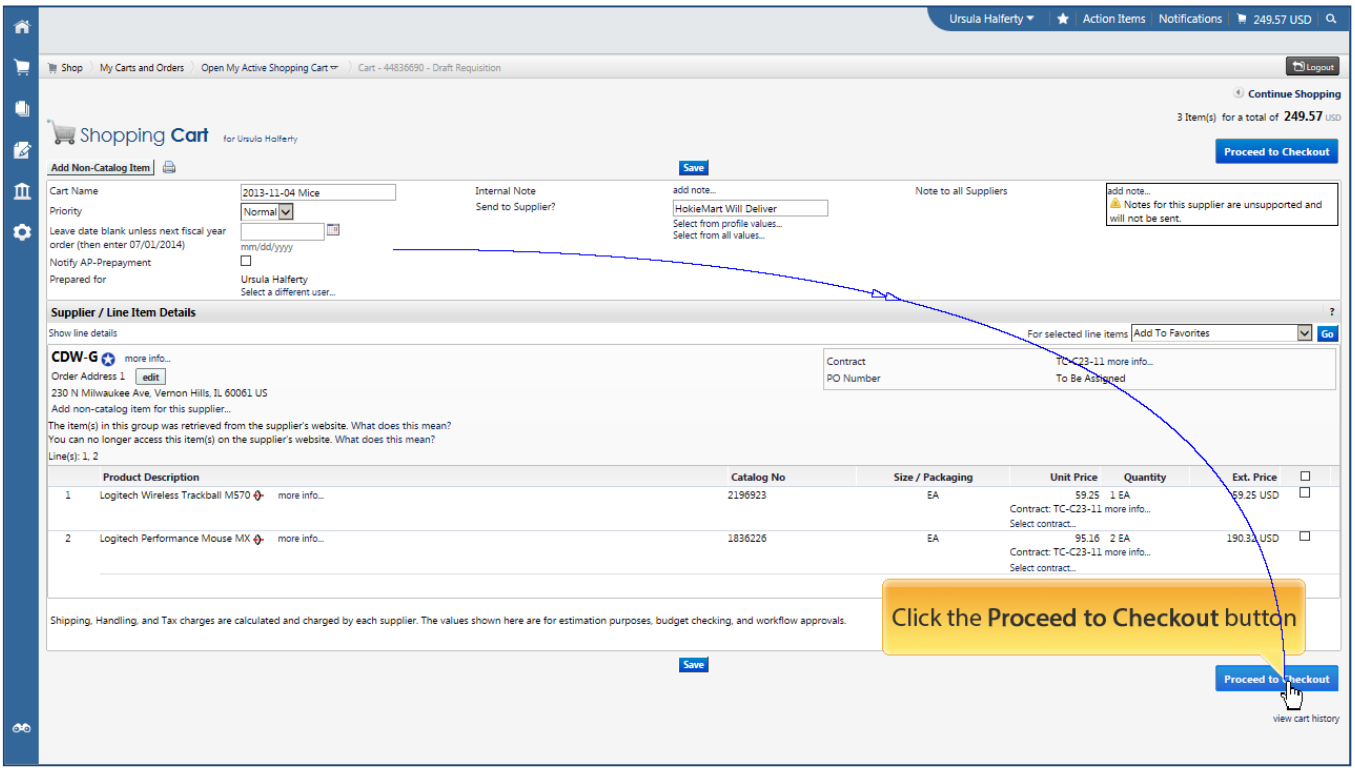

Send to Supplier?
HokieMart Will Deliver
Hide profile values...
HokieMart Will Deliver - HokieMart will distribute the ...
User Will Deliver - Requisitioner must deliver PO ...

In most cases, "HokieMart will Deliver" will be the correct response. It is the default response.

If the delivery method should be changed;

- Click "Select from profile values."
- From the drop down menu, choose:
  - "HokieMart Will Deliver" or "User Will Deliver."

Once complete, select "Proceed to Checkout".



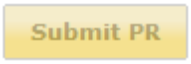
Users will not be taken to the Final Review.

A reminder message will appear asking the user to "Verify delivery method" with each requisition.

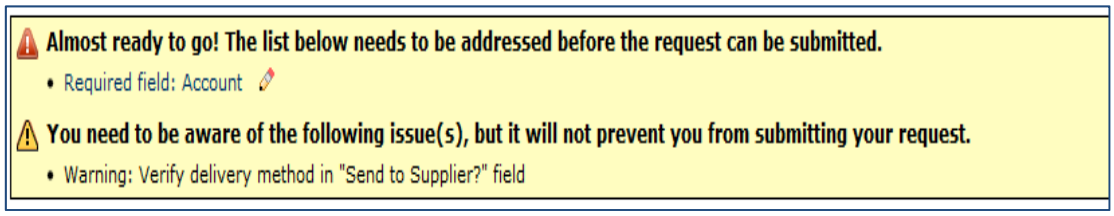
Final Review

After selecting **"Proceed to Checkout,"** users will be ready to complete the Final Review. There is a visible checklist showing information that is complete and information that is still required to submit the requisition.

Notice the Submit PR button is grayed out indicating that it is not active at this point.



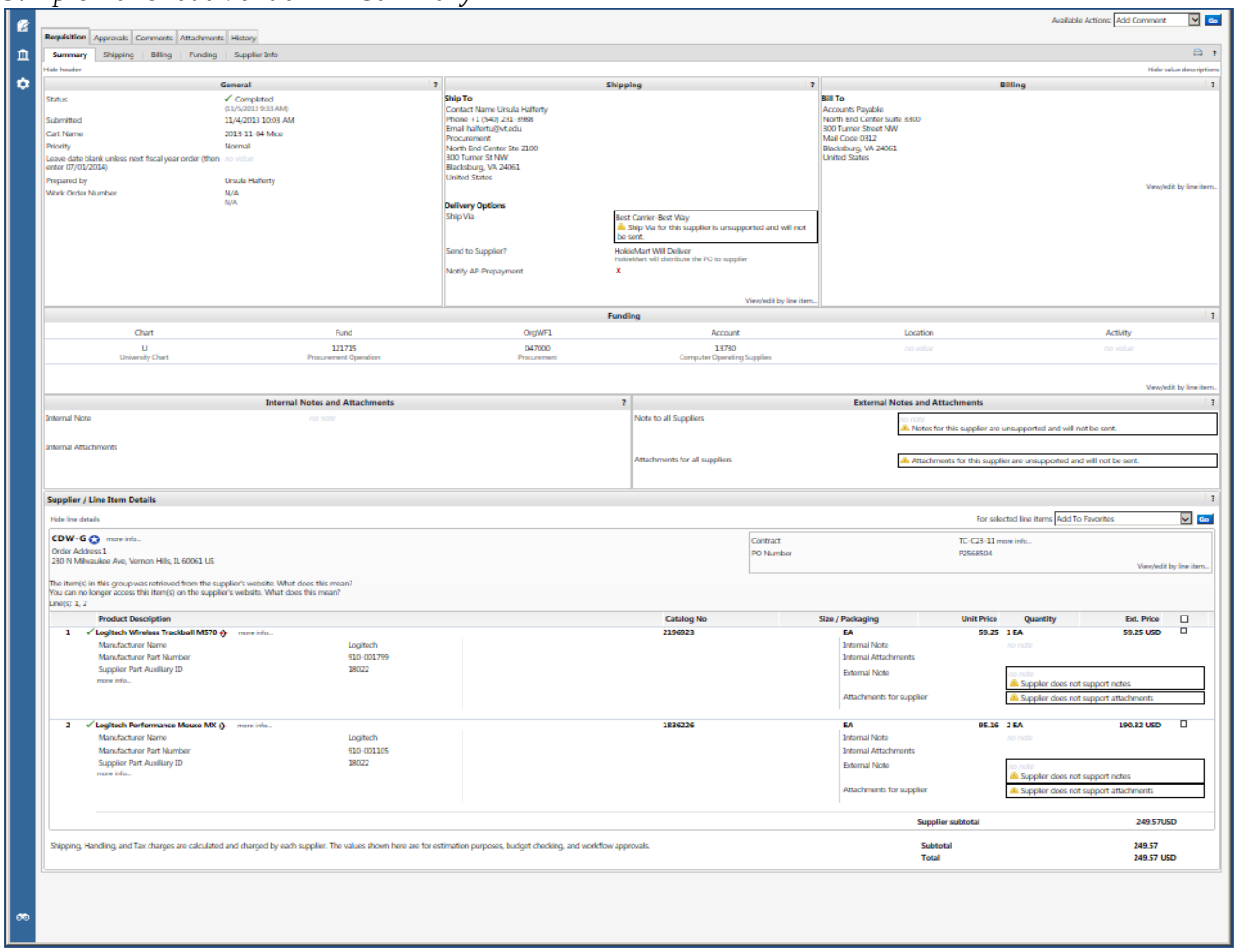
At this time, warnings/reminders may display altering users to specific, necessary, information required prior to submitting PR.


Almost ready to go! The list below needs to be addressed before the request can be submitted.
Required field: Account
You need to be aware of the following issue(s), but it will not prevent you from submitting your request.
Warning: Verify delivery method in "Send to Supplier?" field

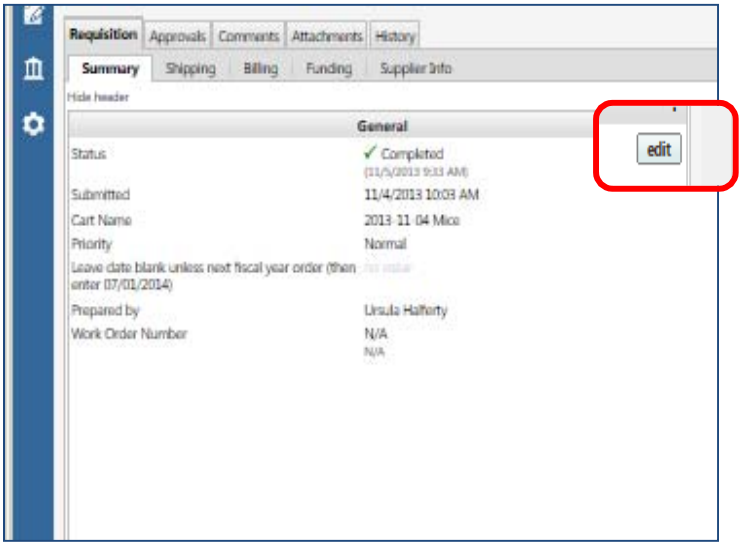
To view the full information relating to the requisition, select the Summary tab. This will display the full requisition.

While in the "Final Review, users have the ability to provide and edit information. This function is required by HokieMart before the user can proceed. The system forces the user to verify the information in the cart and provides a "last chance" for the user to verify the delivery method.

Sample Punchout Vendor PR Summary



General



General displays data entered during the Edit the Cart section. At this time, On-behalf-Of users should select a different user, if they haven't already done so. In the upper portion of the general section, select **"Edit."** This will allow users to edit the information in this section.

To prepare the requisition "On Behalf" of a different user, choose, "Select a different user". A search box will display allowing users to search for a particular individual to purchase on behalf of. Enter the last name of the user you wish to purchase on behalf of and click Search.

- Possible choices will be displayed. Find the particular user from the list and choose Select.
- When complete, click "Save."

For more detail see: **Miscellaneous Topics: On-Behalf-of Requestor.**

Ship To

The ship to address is displayed, based on information stored in the user profile. If additional addresses need to be entered, select **"Edit"** and make appropriate changes.

Bill To

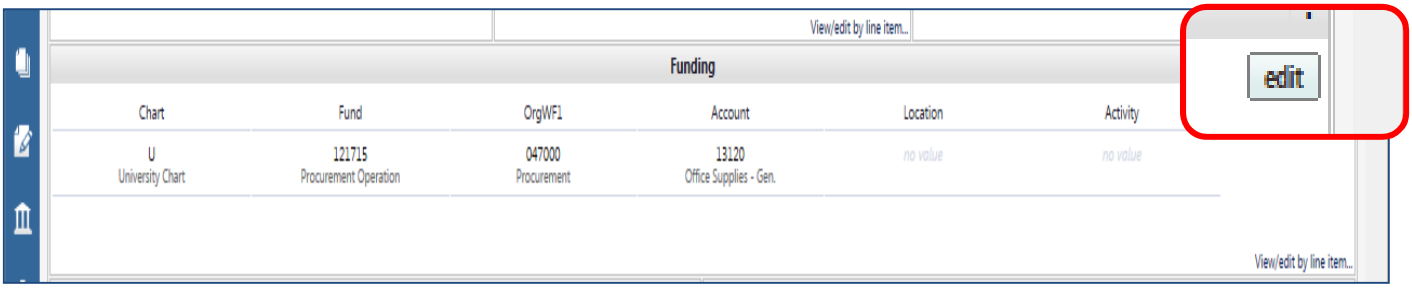
The bill to address is displayed based on information stored in the user profile. Changes should NOT be made here.

Tips: For more information on Ship To and Bill To addresses in HokieMart, see **User Information and Settings, Addresses.**

Funding Information

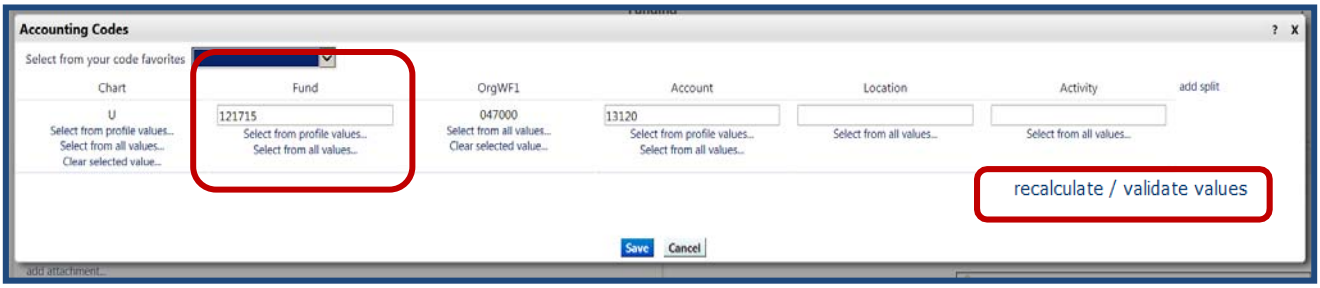
In this section, the fund and account are required. To edit or provide missing information, select '**Edit**." The **Accounting Codes** box will open allowing:

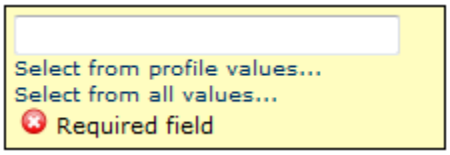
- for changes to be made or
- information to be added.



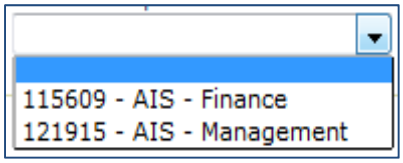
Fund

The fund code may be displayed, if one has been created as a default in the user profile. Some users have access to multiple funds. If the appropriate fund does not display or another fund should be used, users may choose it from their profile by choosing "Select from profile values".





A listing of available funds will be displayed from a drop-down list.



Choose the appropriate fund. If the fund is not in the user's profile, it may be typed in the fund field. Simply highlight and delete. Now enter the appropriate fund.

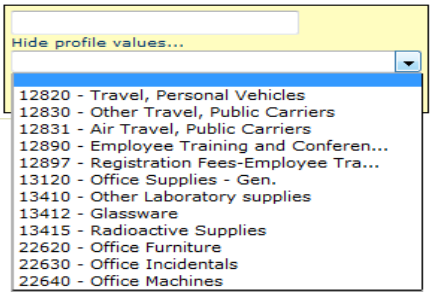
If the fund is typed in, please remember to select **"recalculate/validate values"** from the lower section of the block. This will ensure the correct Org Number matches the Fund.

Account Code

Account codes are used by the Controller's office to classify and categorize expenditures. It is important that correct account codes are used when entering purchases in HokieMart. For a quick reference of account codes see: **Frequently Used Account Codes, Account Codes for Administrative Approval** or visit the Procurement web-site. For a complete list visit the Controller's web-site **www.co.vt.edu** for a complete list.

- If the Value (account code) is known, it may be entered.

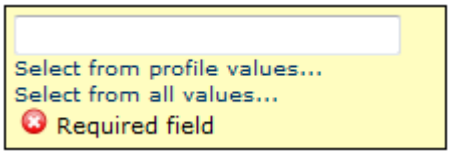
Frequently used account codes can be stored in the user's profile. To learn how to add Account Code Favorites, see **User Information and Settings: Account Code Favorites.**

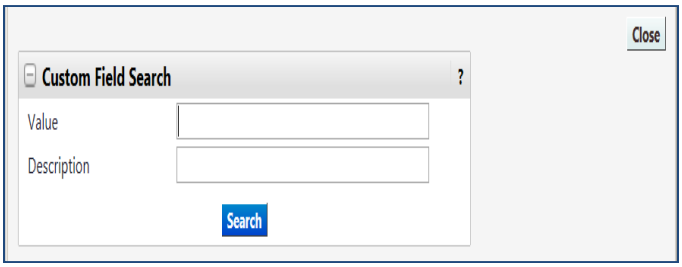

Hide profile values...
12820 - Travel, Personal Vehicles
12830 - Other Travel, Public Carriers
12831 - Air Travel, Public Carriers
12890 - Employee Training and Conferen...
12897 - Registration Fees-Employee Tra...
13120 - Office Supplies - Gen.
13410 - Other Laboratory supplies
13412 - Glassware
13415 - Radioactive Supplies
22620 - Office Furniture
22630 - Office Incidentals
22640 - Office Machines

- If the appropriate account code is in their profile, users may "Select from profile values". If account codes are stored in the user's profile, they will be displayed in a drop-down list by choosing "Select from profile value". The appropriate selection may be made from this list.

Searching for Account Codes

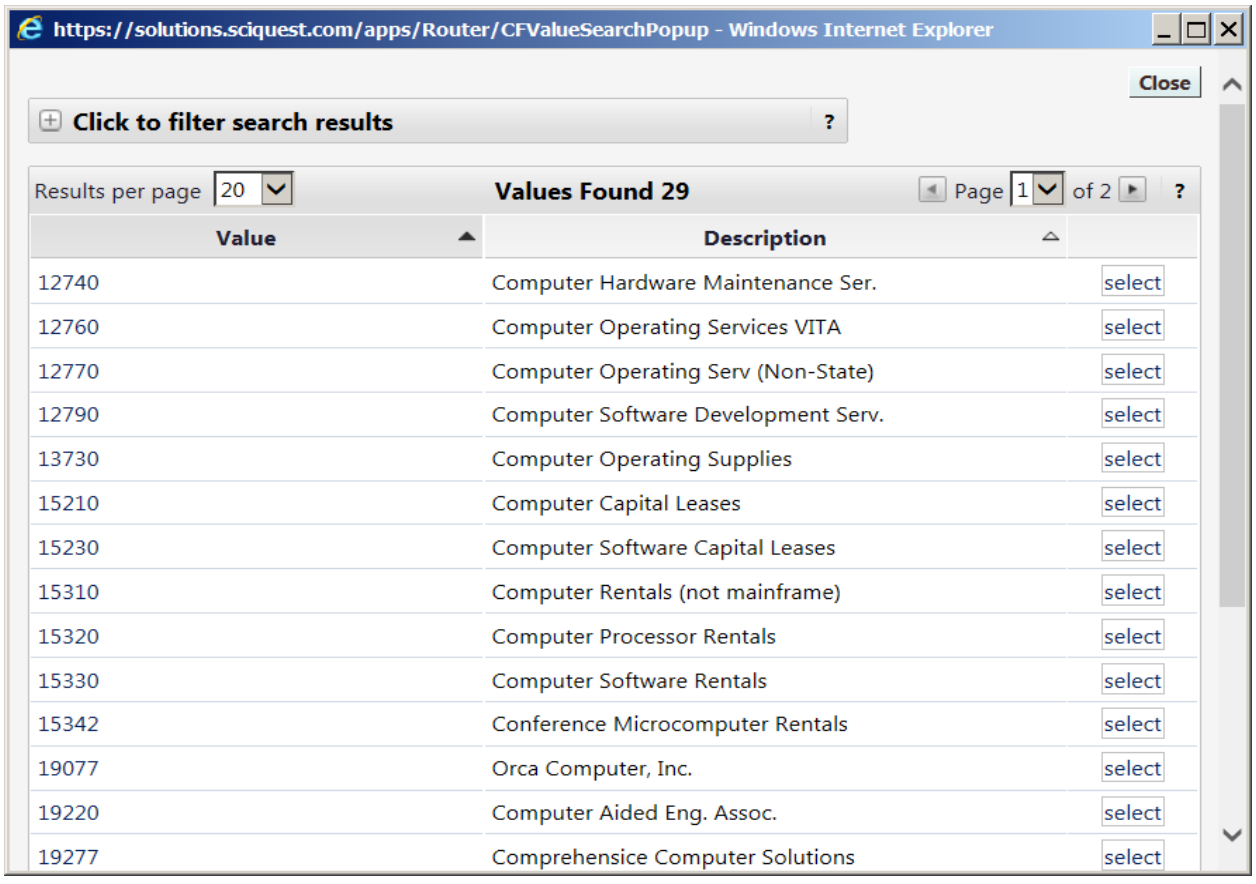
If the account is not available from the user profile, users may need to search for the appropriate account code. To search for account codes, choose "Select from all values".





A search box will be displayed allowing the user to search all available account codes. Enter a key word or part of the description in the Description field. Click "Search".

A list of accounts codes will be displayed. To choose the correct account code, choose "select". This will populate the account code in the shopping cart.


https://solutions.sciquest.com/apps/Router/CFValueSearchPopup - Windows Internet Explorer
Close
Click to filter search results
Results per page 20
Values Found 29
Page 1 of 2
Value
Description
12740 Computer Hardware Maintenance Ser. select
12760 Computer Operating Services VITA select
12770 Computer Operating Serv (Non-State) select
12790 Computer Software Development Serv. select
13730 Computer Operating Supplies select
15210 Computer Capital Leases select
15230 Computer Software Capital Leases select
15310 Computer Rentals (not mainframe) select
15320 Computer Processor Rentals select
15330 Computer Software Rentals select
15342 Conference Microcomputer Rentals select
19077 Orca Computer, Inc. select
19220 Computer Aided Eng. Assoc. select
19277 Comprehensice Computer Solutions select

- Once complete, click "Save".

Splitting the Funding

There are two primary methods of splitting the funding between funds:

- the entire purchase (header level)
- by line item

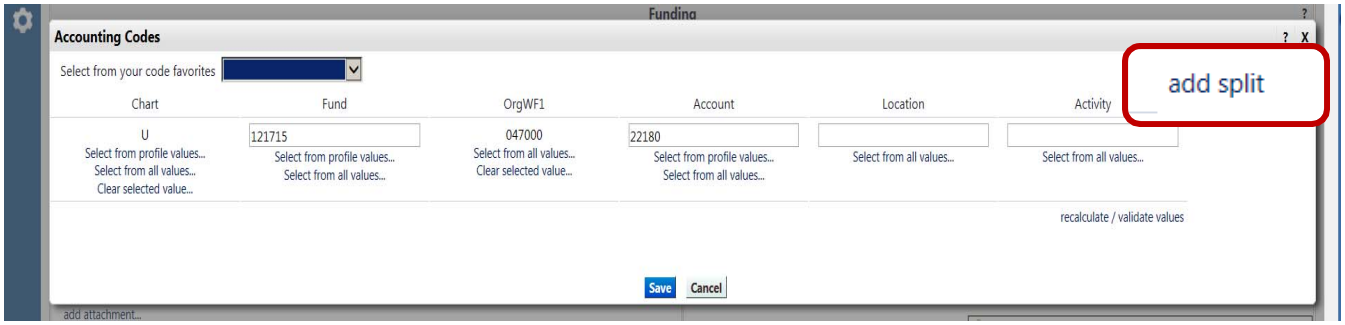
Split Funding at the Header Level

When user wishes to split the funding on a PR at the header level (split the entire amount of the PR),

Click “Edit” in the right-hand corner in the Funding section.

An “Accounting Codes” box will open.

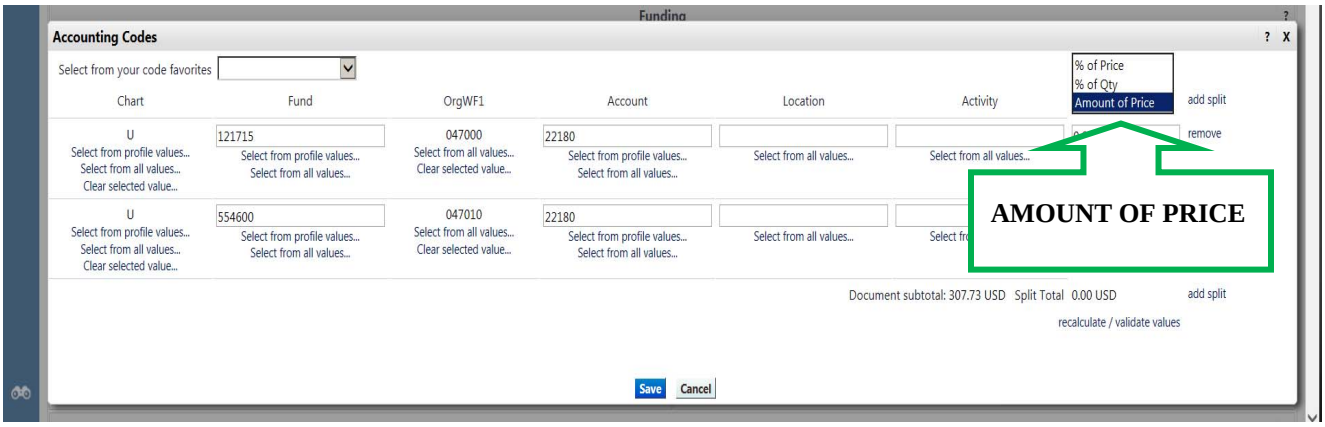
- Click “add split.”



This will which provides the user the option to enter the split amounts by % of Price, % of Quantity, or Amount of Price and provides an extra line for a funding split.

TIP: **DO NOT SELECT % OF PRICE OR % OF QTY. THESE OPTIONS WILL RESULT IN FAILED ORDERS.**

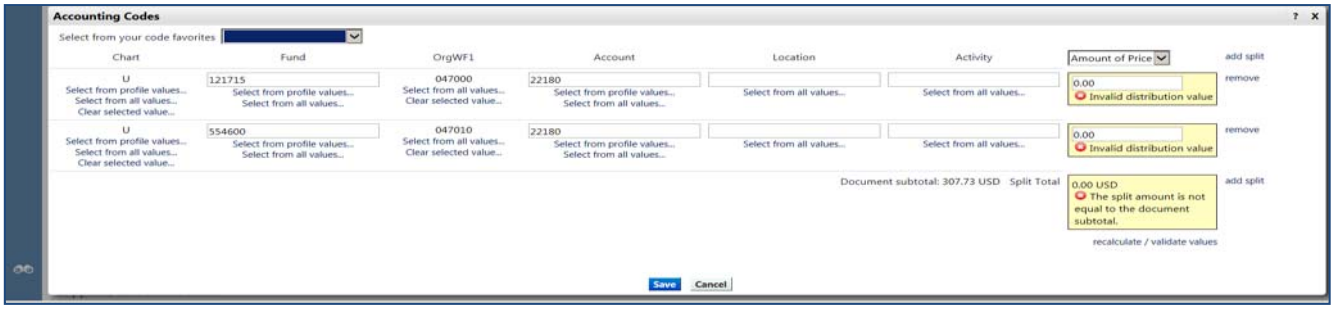
THE ONLY CORRECT OPTION IS AMOUNT OF PRICE.



For additional lines

- Click “add split”.
- Choose how “amount of price.”
- Leave fist duns as it is and in the second line, add new (second) fund.
- The account code will remain the same
- Click “recalculate/validate values” to verify math.
- Split Totals must equal Document Total dollar amount of PR.

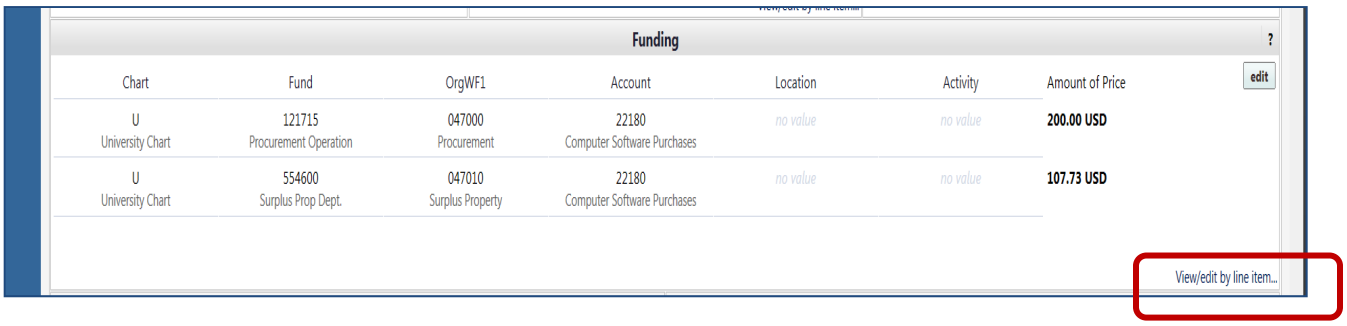
recalculate / validate values



- Click “Save”.

Split Funding at the Line Item Level:

Click “View/edit by line item” in the lower right-hand corner in the Funding section.



Choose the item to be split by selecting “Edit”.

For additional lines:

- Click “add split”.
- Enter the correct amount of price.
- Click “recalculate/validate values.”
- Must equal total dollar amount of PR.
- Click “Save”.

recalculate / validate values

When viewing the Summary tab, the item that has been split will display the following message. “Accounting Codes values have been overridden for this line”. This is an indication the item has been split with other funds.

Internal/External Notes and Attachments

TIP: **Internal/External Notes and Attachments cannot be used on a Punchout Purchase Requisition.**

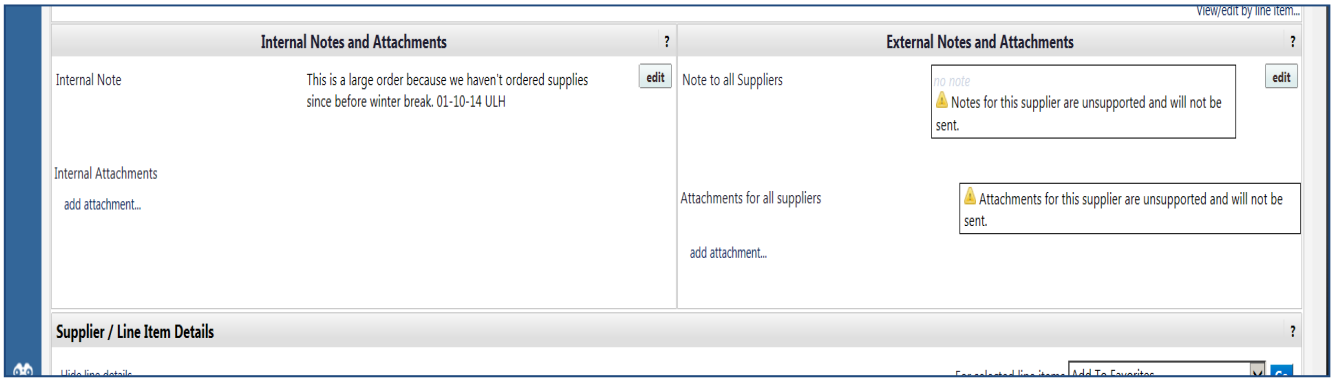
Internal Notes/Attachments are those that can be used:

- by the Requestor and/or the department to reference an item for a specific cart ("for Chemistry 101 lab class," "Dr. Bell's supplies," etc.).
- for notes needed by the Procurement Department ("see attached bid," "confirming invoice," etc.).
- used to provide information to add a New Supplier.

External Notes/Attachments are those intended for:

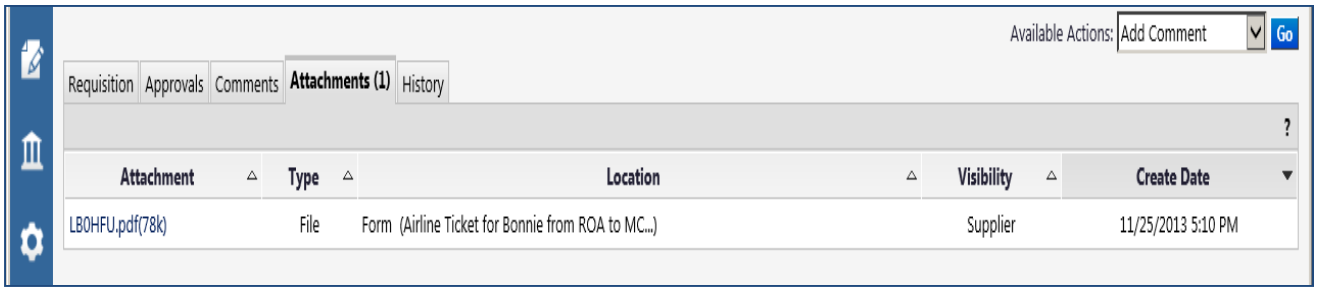
- the supplier ("deliver to loading dock," "ship overnight," etc.).
- if External Notes and Attachments are needed for vendors that are Punchout vendors, use the Non-Catalog form option, and process the Shopping Cart as usual.

Sample of Internal Notes and Attachments **Sample of External Notes and Attachments**


Internal Notes and Attachments
Internal Note
This is a large order because we haven't ordered supplies since before winter break. 01-10-14 ULH
edit
Internal Attachments
add attachment...
External Notes and Attachments
Note to all Suppliers
no note
Notes for this supplier are unsupported and will not be sent.
edit
Attachments for all suppliers
Attachments for this supplier are unsupported and will not be sent.
add attachment...
Supplier / Line Item Details

Attachments

An attachments tab will track the number of attachments added to the PR. The number will display in parenthesis after the tab heading. i.e. **Attachments (1)**.



SCHEV Orders

It is critical that when entering multiple SCHEV numbers that they be entered exactly as shown below (with **no spaces** inserted in the SCHEV number). This information is to be added in External Notes section of the HokieMart form.

1. Order for one fixed asset (i.e. one SCHEV number)**:**
   ETF=2080640151

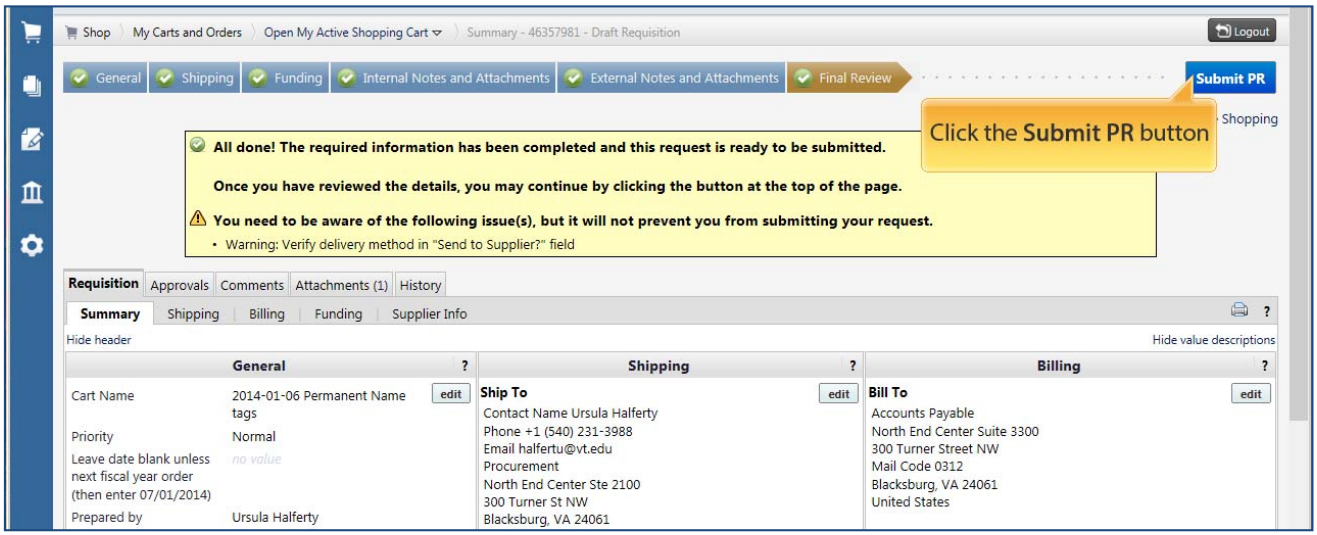
2. Order containing multiple fixed assets in a given range (i.e. the range below would account for 4015,4016,4017,4018,4019,4020,4021):
   ETF=2080640151-2080640211

3. Order containing multiple fixed assets not in a consistent range:
   ETF=2080640151,2080640171,2080640211

Submit the PR

After completing the "Final Review" the user is ready to submit the PR for processing.

- Click "Submit PR."

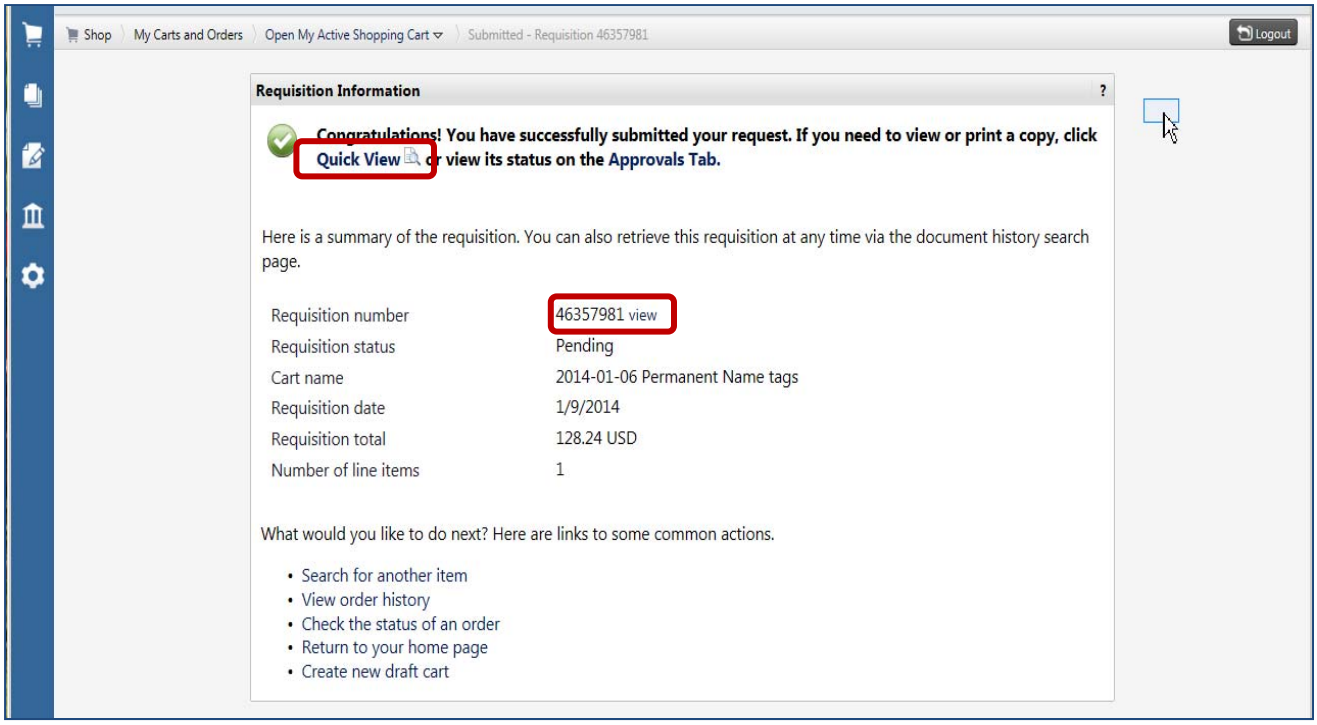


- The PR is now complete.
- A PR number will display.

Tip: It is suggested that you write the PR number down until it becomes a PO.)

To view the completed requisition:

- Click on the words "**QuickView**" or the PR number next to the word "**view**."


Shop
My Carts and Orders
Open My Active Shopping Cart
Submitted - Requisition 46357981
Logout
Requisition Information
Congratulations! You have successfully submitted your request. If you need to view or print a copy, click Quick View or view its status on the Approvals Tab.
Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.
Requisition number
46357981 view
Requisition status
Pending
Cart name
2014-01-06 Permanent Name tags
Requisition date
1/9/2014
Requisition total
128.24 USD
Number of line items
1
What would you like to do next? Here are links to some common actions.
Search for another item
View order history
Check the status of an order
Return to your home page
Create new draft cart

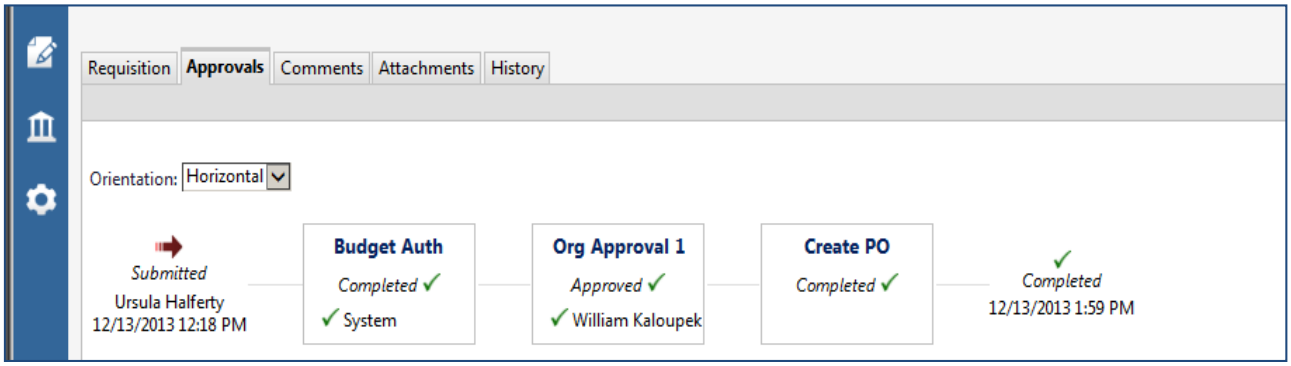
Additional Topics Related to Order Processing

PR Approval Workflow

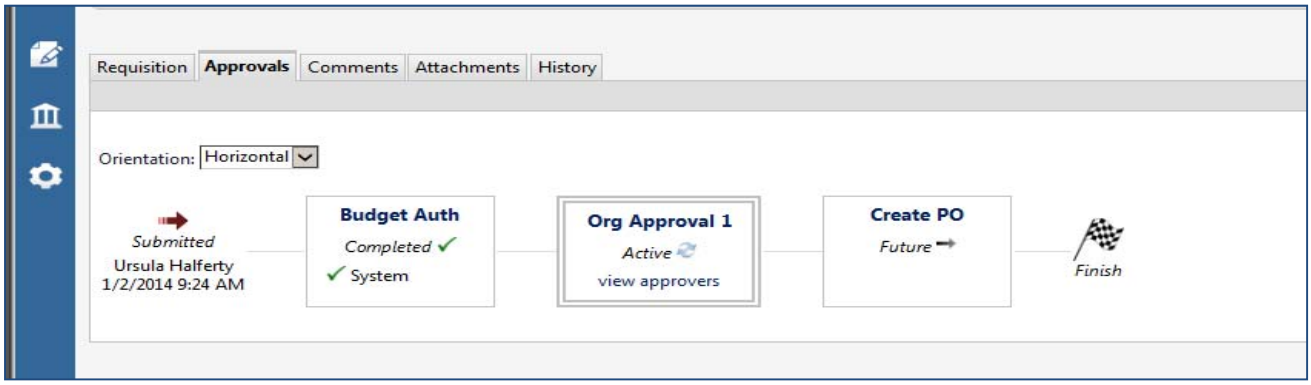
The purchase requisition (PR) is submitted into the HokieMart workflow and will proceed to each level of approval. After the PR has completed all approval levels, it will become a purchase order (PO). To view the steps select the PO Approvals tab as seen below.

Example: The PR below will go through four steps before becoming a PO:

Step 1: The departmental budget is checked to verify that funds are available.
Step 2: The first level approver receives and can approve or reject all or part of the PR.
Step 3: The second level approver receives and can also approve or reject all or part of the PR.
Step 4: The PO has been completed and the date and time are displayed.



Example #2: The PR below has not been finalized and is still pending.



Show Monetary Calculations

A link, "show monetary calculations," is available in account split edit that displays a calculated monetary value for each percentage (%) value entered by the user. The calculation is for information purposes only and can be useful in determining errors in monetary splits.

Click "show monetary calculations" and the dollar amount will be displayed for each "% of Price" or "% of Quantity."

Note: Remember splitting by **Amount of Price** is the recommended split option choice.

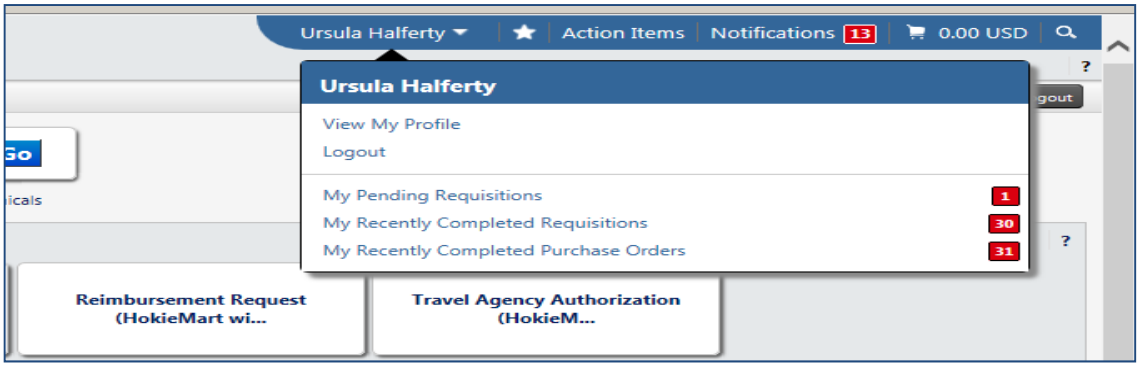
Copying A Cart

Note: ***This option cannot be used with Punchout suppliers (i.e. Air Gas, Fisher, Grainger, Guy Brown, etc.)***

You cannot copy and duplicate a Cart from a completed PO, this feature only works in either "My Completed Requisitions" or "My Pending Requisitions."

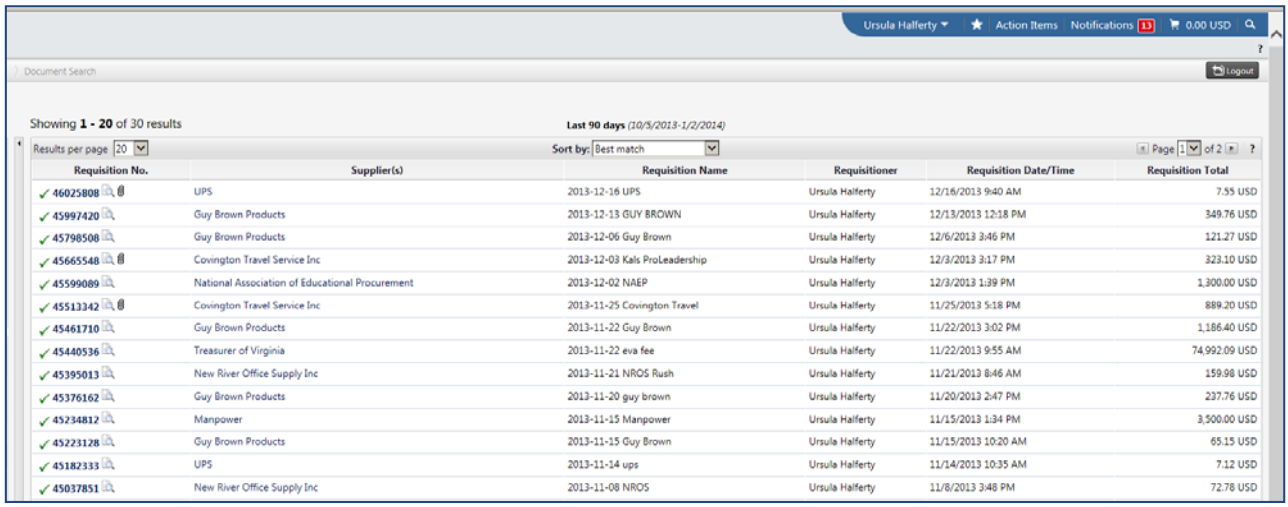
Copying a cart is a time saving feature if the user wishes to duplicate a previous PR.

- Click the User Profile to activate the drop down menu.
- Click "My Recently Completed Requisitions" or "My Pending Requisitions."



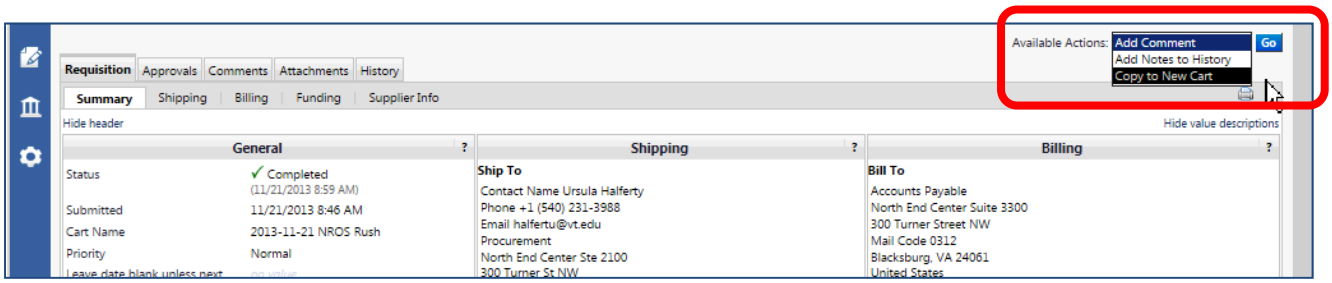
Displayed will be a listing of all PRs that a user has placed.

Note: **PR's "Prepared For" others will not display.**


Ursula Halferty
Action Items
Notifications 13
0.00 USD
Logout
Showing 1 - 20 of 30 results
Last 90 days (10/5/2013-1/2/2014)
Results per page 20
Sort by: Best match
Page 1 of 2
Requisition No. | Supplier(s) | Requisition Name | Requisitioner | Requisition Date/Time | Requisition Total
46025808 | UPS | 2013-12-16 UPS | Ursula Halferty | 12/16/2013 9:40 AM | 7.55 USD
45997420 | Guy Brown Products | 2013-12-13 GUY BROWN | Ursula Halferty | 12/13/2013 12:18 PM | 349.76 USD
45798508 | Guy Brown Products | 2013-12-06 Guy Brown | Ursula Halferty | 12/6/2013 3:46 PM | 121.27 USD
45665548 | Covington Travel Service Inc | 2013-12-03 Kals ProLeadership | Ursula Halferty | 12/3/2013 3:17 PM | 323.10 USD
45599089 | National Association of Educational Procurement | 2013-12-02 NAEP | Ursula Halferty | 12/3/2013 1:39 PM | 1,300.00 USD
45513342 | Covington Travel Service Inc | 2013-11-25 Covington Travel | Ursula Halferty | 11/25/2013 5:18 PM | 889.20 USD
45461710 | Guy Brown Products | 2013-11-22 Guy Brown | Ursula Halferty | 11/22/2013 3:02 PM | 1,186.40 USD
45440536 | Treasurer of Virginia | 2013-11-22 eva fee | Ursula Halferty | 11/22/2013 9:55 AM | 74,992.09 USD
45395013 | New River Office Supply Inc | 2013-11-21 NROS Rush | Ursula Halferty | 11/21/2013 8:46 AM | 159.98 USD
45376162 | Guy Brown Products | 2013-11-20 guy brown | Ursula Halferty | 11/20/2013 2:47 PM | 237.76 USD
45234812 | Manpower | 2013-11-15 Manpower | Ursula Halferty | 11/15/2013 1:34 PM | 3,500.00 USD
45223128 | Guy Brown Products | 2013-11-15 Guy Brown | Ursula Halferty | 11/15/2013 10:20 AM | 65.15 USD
45182333 | UPS | 2013-11-14 ups | Ursula Halferty | 11/14/2013 10:35 AM | 7.12 USD
45037851 | New River Office Supply Inc | 2013-11-08 NROS | Ursula Halferty | 11/8/2013 3:48 PM | 72.78 USD

- Click on the desired PR number; it will be displayed in full detail.

To copy to a new cart from the Available Actions drop-down menu:



- Click "Copy to New Cart."
- Click "Go."

User will now be in **new Cart** – **Draft Requisition**.

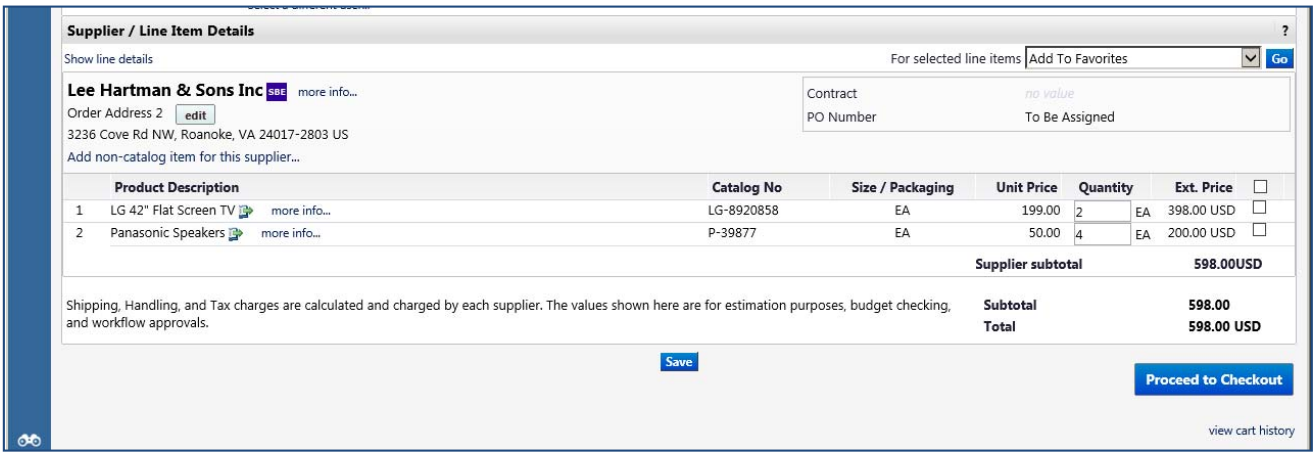
Note:

- All information from the previous PR has been completely duplicated (funding, vendor, amount, attachments, etc.)
- User can now edit the PR if desired (add/delete items; change the unit of measure, etc.).
- Complete the PR.

Move Items to Another Cart

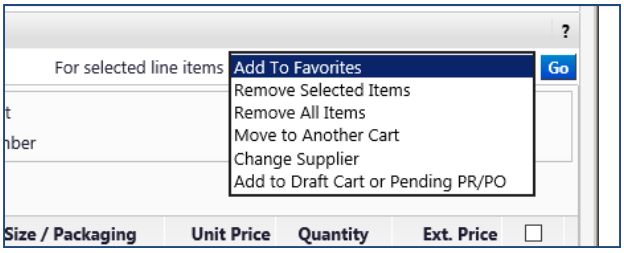
When user is in a **draft cart** and wishes to move an item(s) to a new cart:

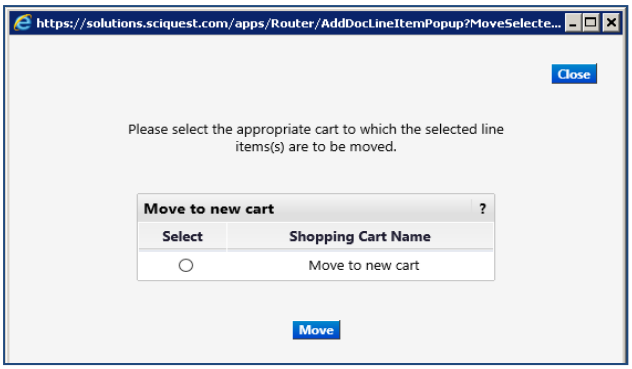
- Place a check mark in the right-hand box of the line item that you wish to move.


Supplier / Line Item Details
Show line details
For selected line items
Add To Favorites
Go
Lee Hartman & Sons Inc
SBE
more info...
Order Address 2
edit
3236 Cove Rd NW, Roanoke, VA 24017-2803 US
Add non-catalog item for this supplier...
Contract
no value
PO Number
To Be Assigned
Product Description
Catalog No
Size / Packaging
Unit Price
Quantity
Ext. Price
1 LG 42" Flat Screen TV more info... LG-8920858 EA 199.00 2 EA 398.00 USD
2 Panasonic Speakers more info... P-39877 EA 50.00 4 EA 200.00 USD
Supplier subtotal 598.00USD
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.
Subtotal 598.00
Total 598.00 USD
Save
Proceed to Checkout
view cart history

From the drop-down menu:

- Select “Move to Another Cart”
- Click “Go”

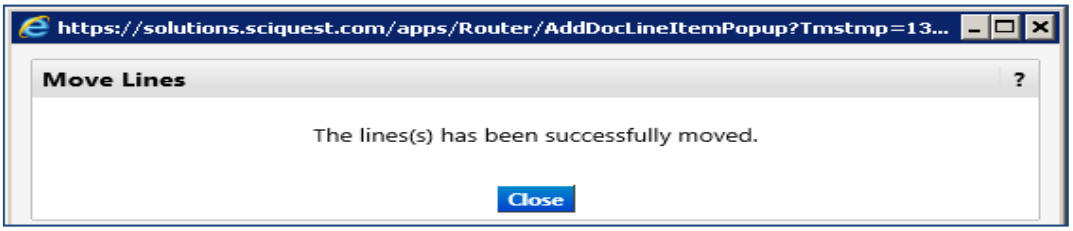




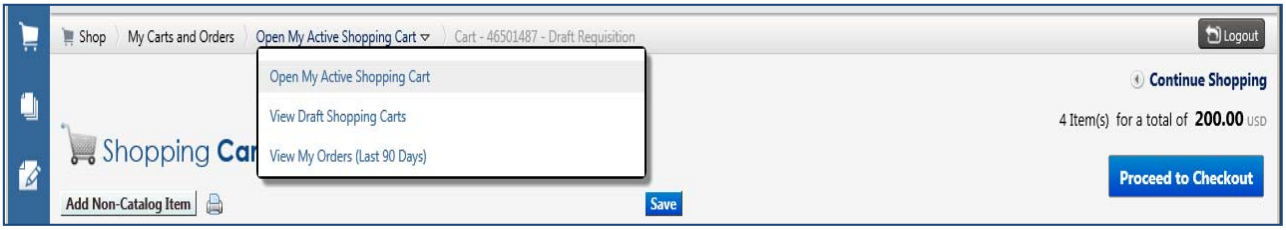
A pop-up box with confirmation message “Move to new cart” will appear**.**

- Click the radio button to confirm
- Then click “Move.”

- Message will display indicating item has been placed in a new cart.
- Click “Close”.

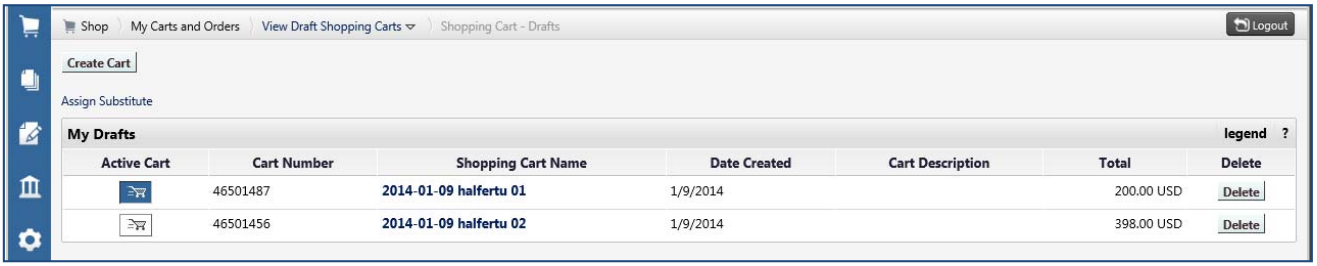


To view the newly created draft Cart select: **“Open My Active Shopping Cart”** from the menu bar to activate the drop down menu. Select “View my Draft Shopping Carts.”

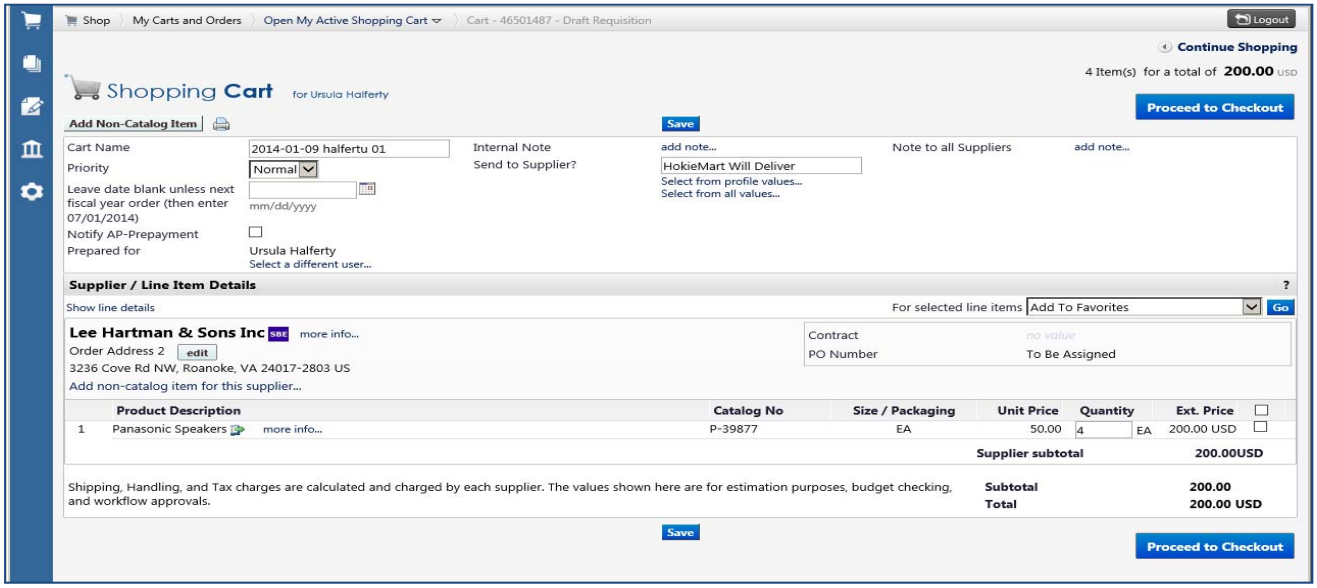


A list of draft carts will appear.

- Select “Draft Carts”
- Click on the desired cart.



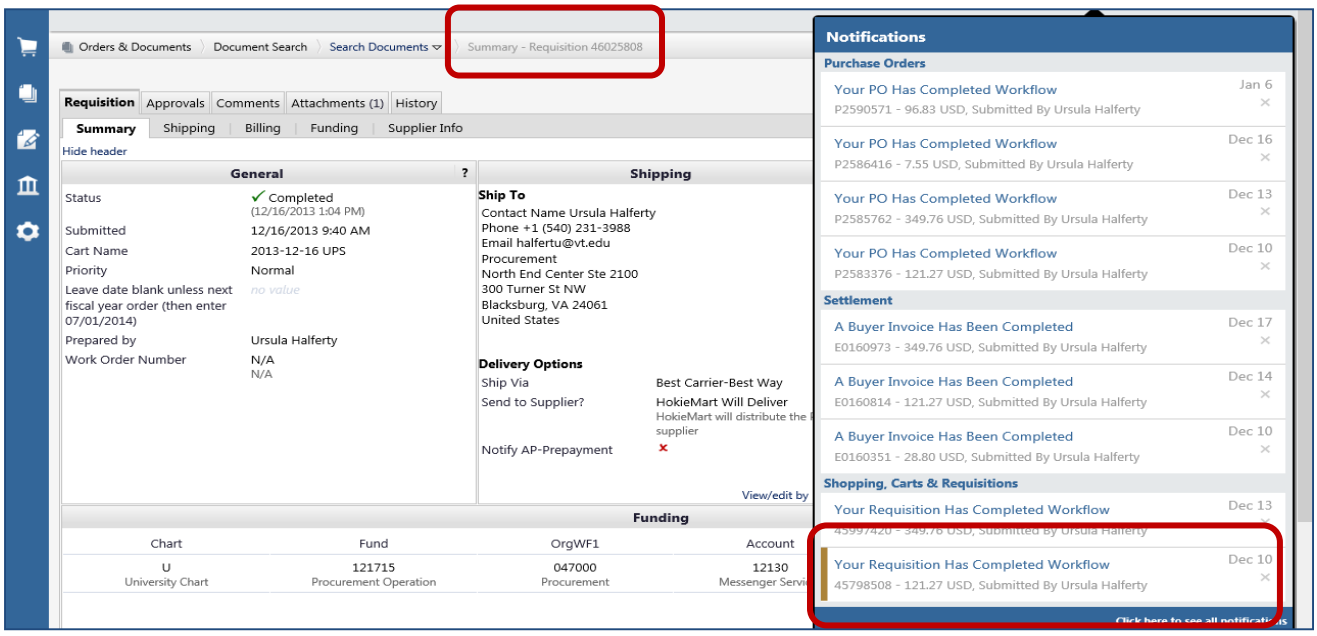
The line item and all other PR detail are now in **Cart – Draft Requisition.**



- Complete the PR.

View Purchase Requisition (PR) Number from a Cart

User will now be able to view the requisition Number in the Cart – Draft Requisition. The cart number will be the future PR number. In this example cart number is 46025808.



The completed PR number is PR46025808.

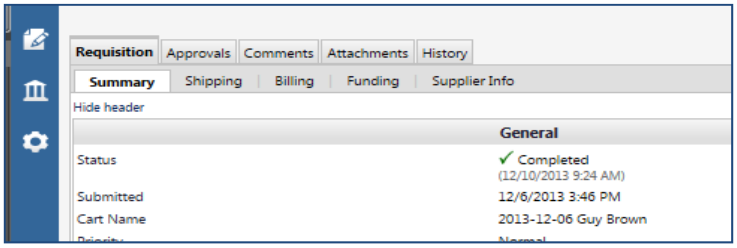
This will allow the Requestor to provide the cart number to the HokieMart support staff for any needed assistance with the cart.

Adding Comments to PR or PO

Requestors and Approvers have the ability to add comments to the PR or PO. In addition, a comment may be sent to other HokieMart users. Notification of a "comment" will be transmitted via email to the designated recipients. Examples of situations where a comment might be useful are:

- To notify an Approver or other HokieMart user that a PR is ready for approval
- To add an attachment
- To add a comment to a PR/PO after the PR/PO has been processed

Comments may be added during the Final Review of the PR. To add a comment:



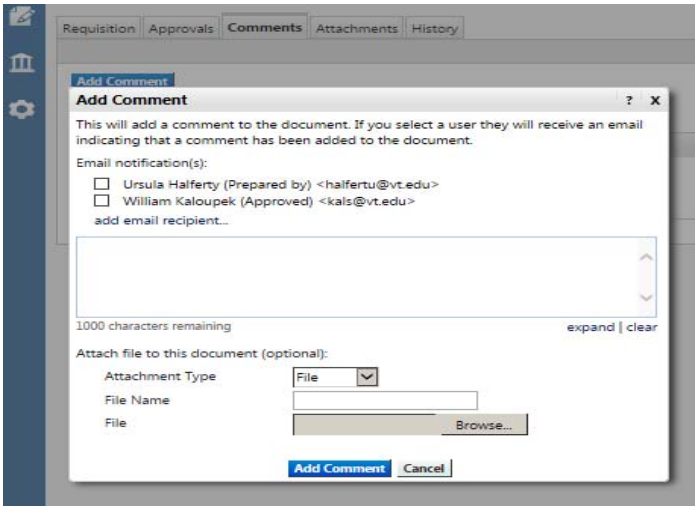
- Select the "Comments" tab.
- Select "Add Comment"

The "Add Comment" box will open.

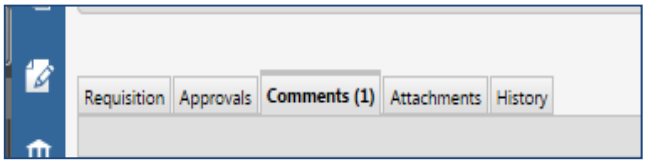
- Add the desired comment.
- Click "Add Comment."

Attachments may also be added to the comment.

- Select "Browse"
- Select the file to be added
- Select "Open"

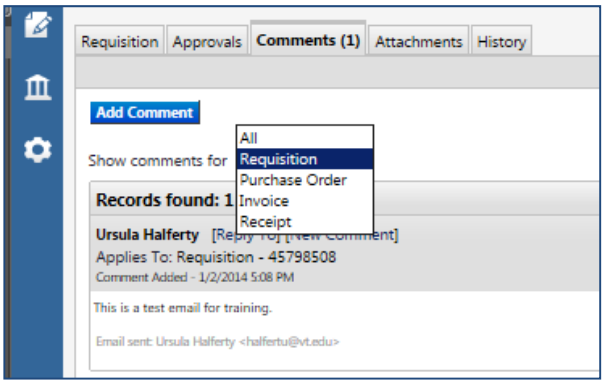


The comment has now become a permanent part of the PR/PO.



A "Comments" tab will track the number of attachments added to the PR. The number will display in parenthesis after the tab heading. Select the Comment tab to view comments.

Viewing All Comments

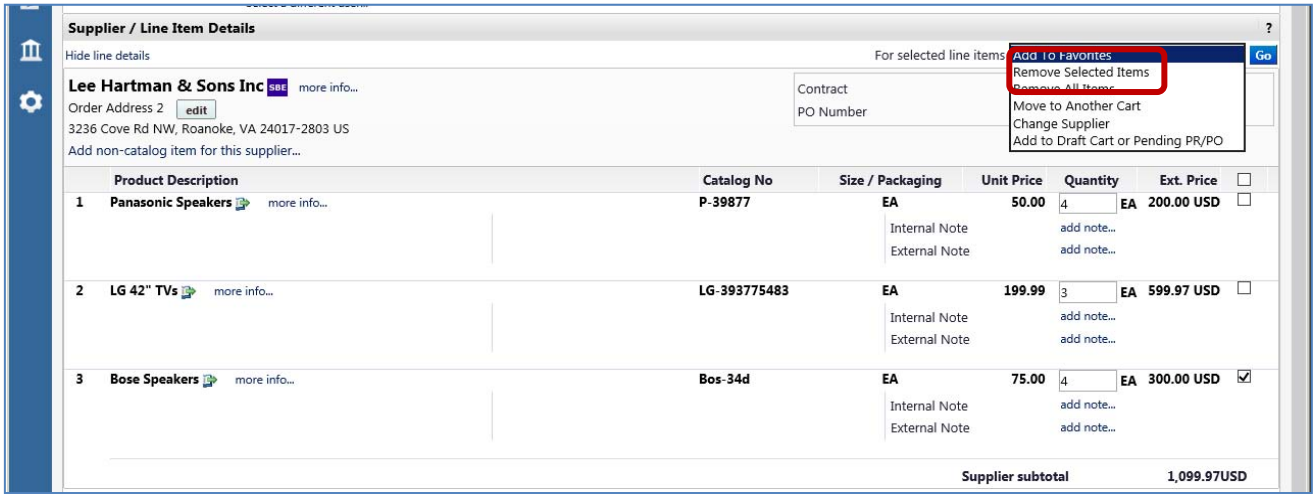


User may view all comments related to a PR, PO, and Receipt from either one of these documents. By going to the Comments Tab and selecting "All" on either a PR, PO, or Receipt, all comments will now appear on one screen.

Remove Item(s) from the Cart

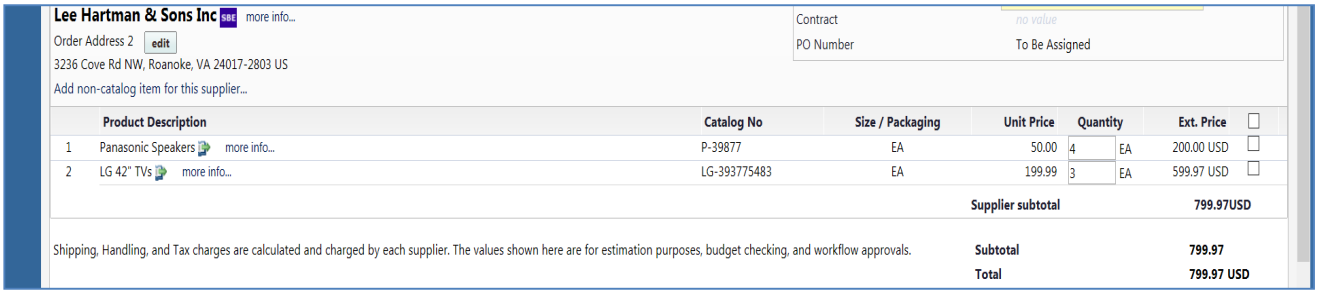
When the user wishes to remove items from an active cart.

- Place a check mark in the box next to the item to be removed.



- Choose "Remove Selected Items" from the down-down menu.
- Click "Go."

Selected items have now been removed.


Lee Hartman & Sons Inc
more info...
Order Address 2
edit
3236 Cove Rd NW, Roanoke, VA 24017-2803 US
Add non-catalog item for this supplier...
Contract
no value
PO Number
To Be Assigned
Product Description
Catalog No
Size / Packaging
Unit Price
Quantity
Ext. Price
1 Panasonic Speakers P-39877 EA 50.00 4 EA 200.00 USD
2 LG 42" TVs LG-393775483 EA 199.99 3 EA 599.97 USD
Supplier subtotal 799.97USD
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.
Subtotal 799.97
Total 799.97 USD

Return Purchase Requisition to Requisitioner

An Approver has the ability to return the Purchase Requisition (PR) to the Requestor (requisitioner) for any changes/updates that need to be made. This will allow the Approver to return rather than reject the PR.

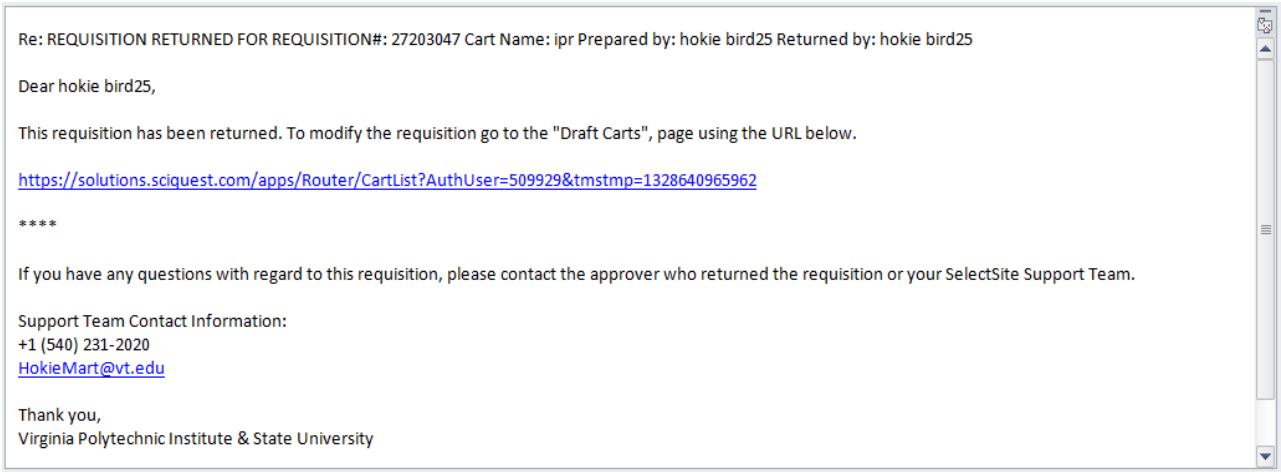
After the Approver has assigned and viewed the PR and returned, the Requestor will receive an automatic email with the URL link. The Requestor must be "logged into" HokieMart in order to open the link. When a requisition is returned by the Approver it reverts to a Draft Requisition.

Requestor should:

- Click on "cart."
- Click on "draft carts."
- Make the requested changes/updates and resubmit the PR into the workflow.

The PR number will remain the same as the original. All previous documentation and notes will be preserved. The requisition will restart the workflow from the beginning regardless of the step it was returned from.

A HokieMart system Notification or Email will be received by the Requestor notifying them of the return. The requestor must have "Cart/PR rejected/returned" checked in their Profile in order to receive the emails. *(See User Profile for more information related to this topic).*



Re: REQUISITION RETURNED FOR REQUISITION#: 27203047 Cart Name: ipr Prepared by: hokie bird25 Returned by: hokie bird25

Dear hokie bird25,

This requisition has been returned. To modify the requisition go to the "Draft Carts", page using the URL below.

https://solutions.sciquest.com/apps/Router/CartList?AuthUser=509929&tmstmp=1328640965962

****

If you have any questions with regard to this requisition, please contact the approver who returned the requisition or your SelectSite Support Team.

Support Team Contact Information:
+1 (540) 231-2020
HokieMart@vt.edu

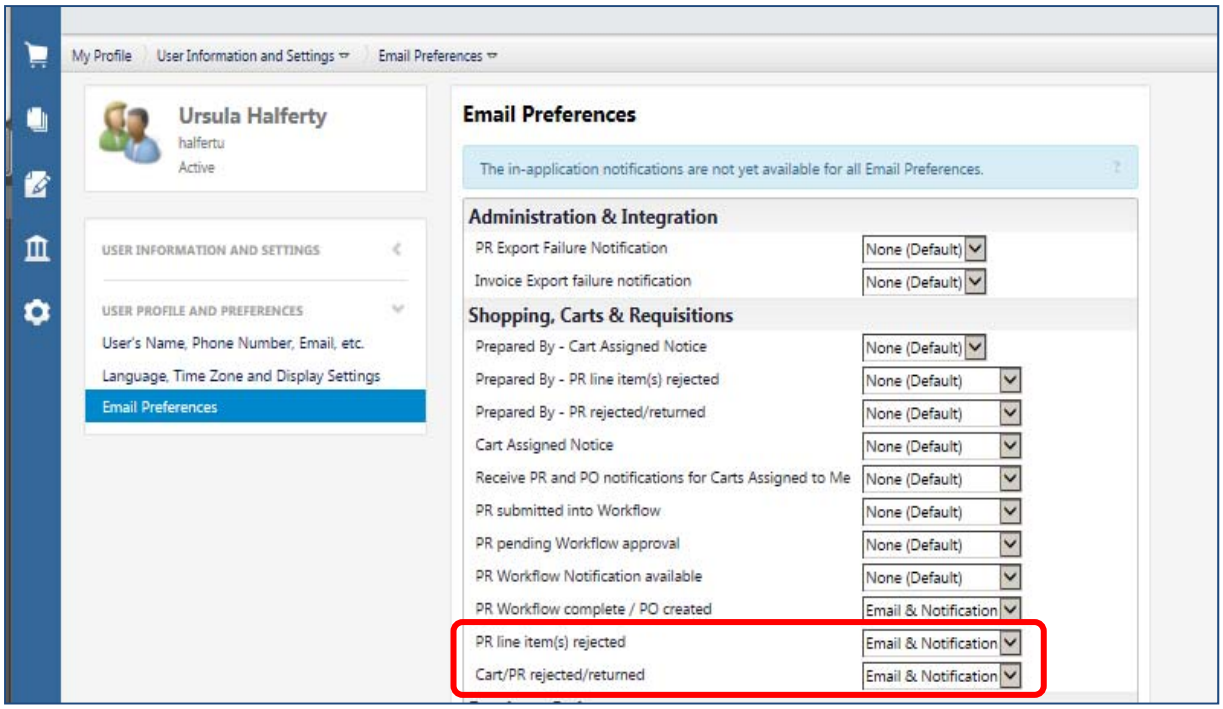
Thank you,
Virginia Polytechnic Institute & State University

Automatic Return of Requisitions Rejected by Banner

A Banner budget authorization may fail due to an "invalid user," "invalid accounts," or "insufficient funds." A feature will now return the rejected budget authorization PRs to the Requestor in the form of a draft cart. Users can now correct and resubmit the PR without having to create a new PR.

The user will receive an automatic email notification that the PR has been returned and that action is needed. The reason that the PR is being returned is included in the email.

NOTE: The user must have "Cart/ rejected/returned" checked in their email preferences to receive this automatic email. *(See User Profile for more information related to this topic).*

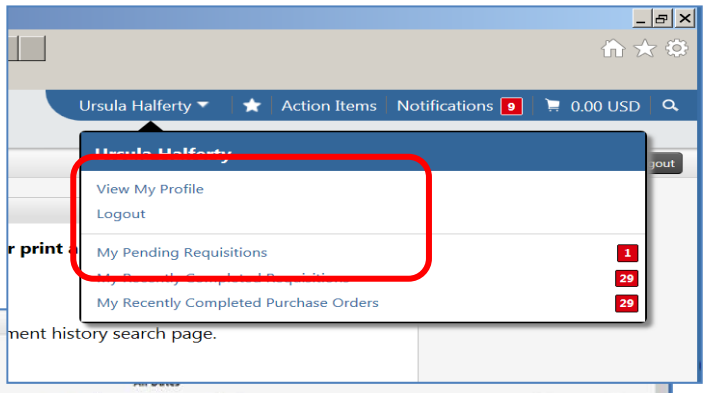


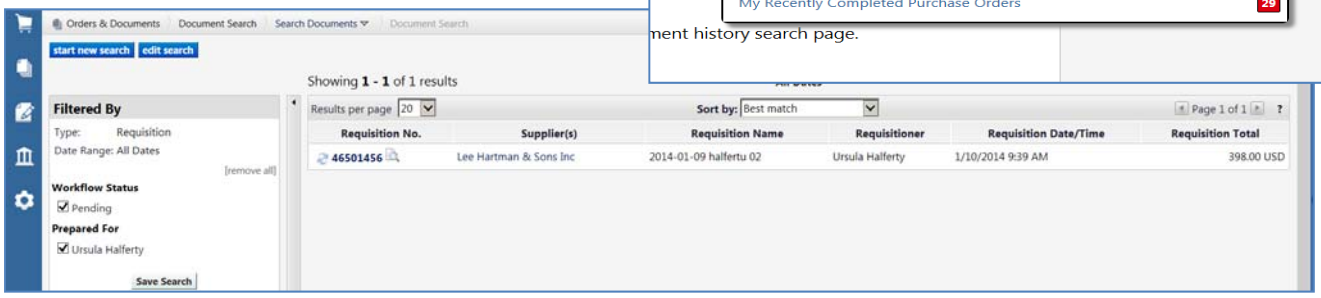
After choosing the "Submit PR" again option, the workflow will begin again from **Step 1** (Budget Authorization).

Withdraw a PR

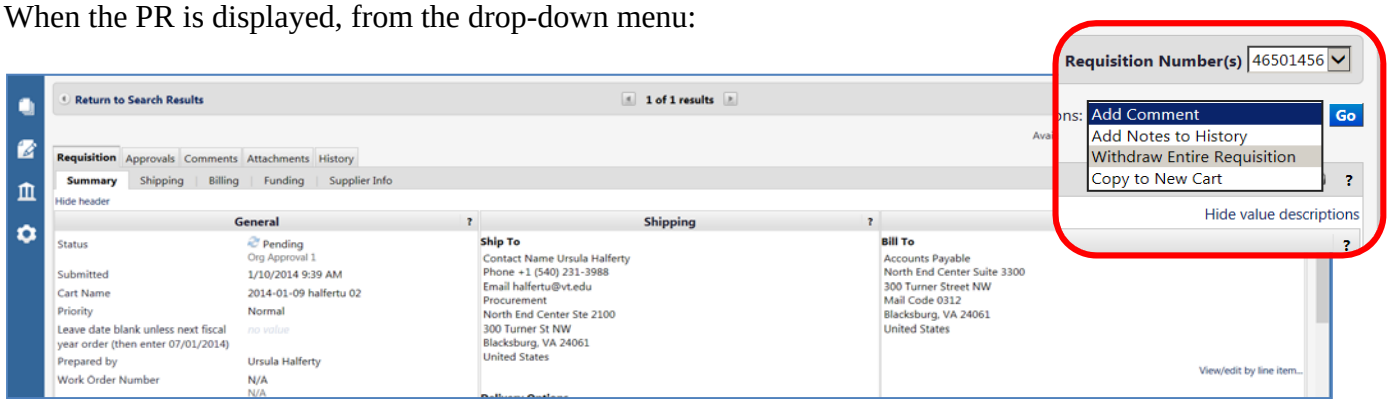
A Requestor can withdraw a PR at any stage **prior to it becoming a PO**.

- Click on the User Profile drop down menu and select **"My Pending Requisitions"** to bring up the PR **or**
- Perform a query by the PR number.
- Select and open the desired PR





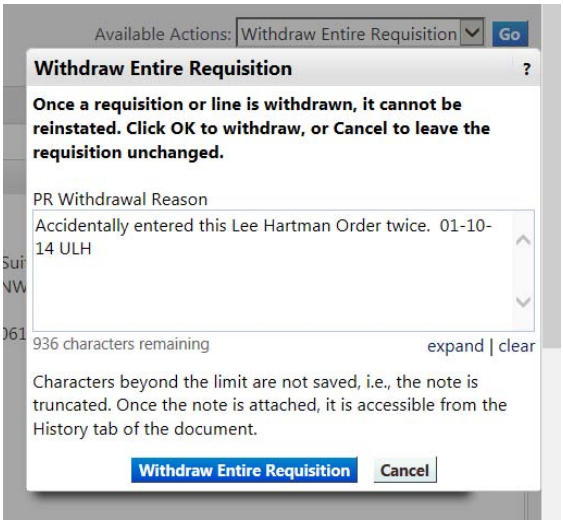
When the PR is displayed, from the drop-down menu:



- Choose "Withdraw Entire Requisition."

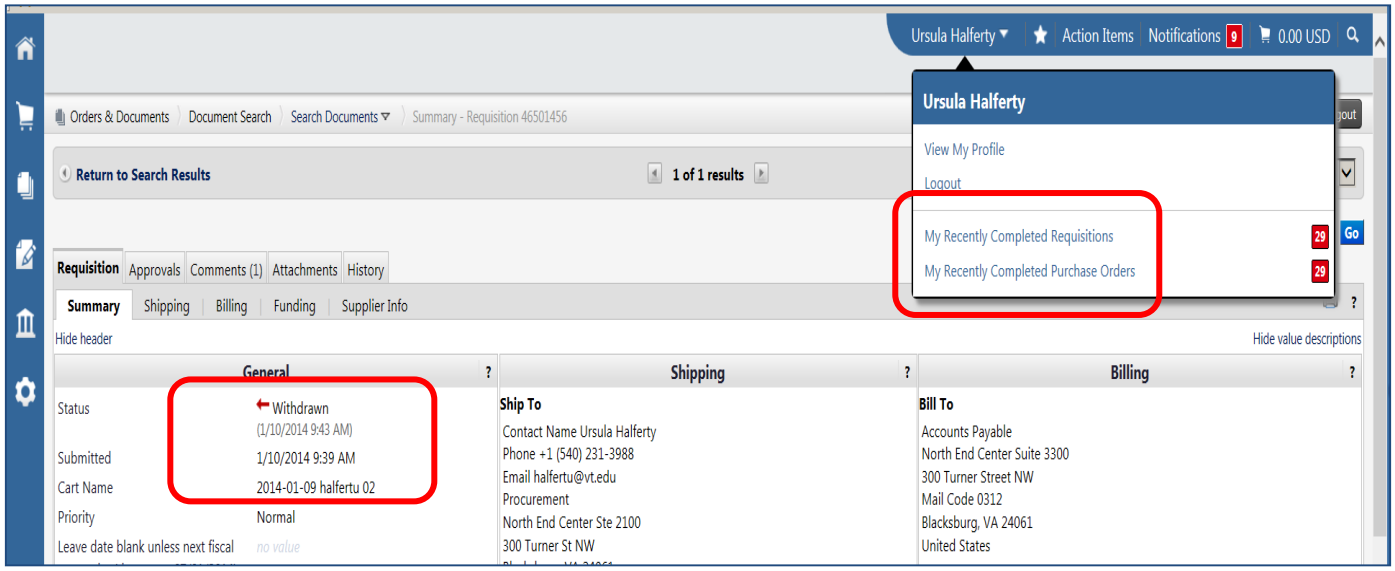
A box will open which will allow the user to provide a reason for the withdrawal.

- Adding a comment to a Withdrawn Requisition is required.
- Click "Withdraw Entire Requisition."

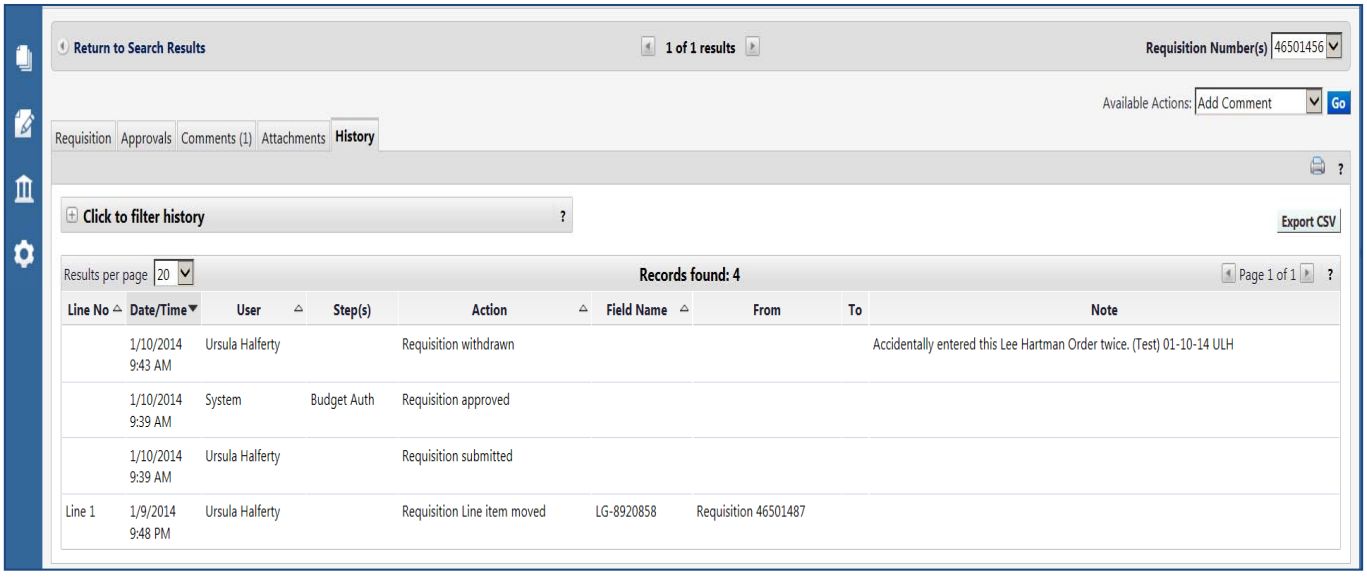

Available Actions: Withdraw Entire Requisition
Go
Withdraw Entire Requisition
Once a requisition or line is withdrawn, it cannot be reinstated. Click OK to withdraw, or Cancel to leave the requisition unchanged.
PR Withdrawal Reason
Accidentally entered this Lee Hartman Order twice. 01-10-14 ULH
936 characters remaining
expand | clear
Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.
Withdraw Entire Requisition
Cancel

This action will withdraw the requisition.

- A red arrow will appear in the “Status” as withdrawn. This action may only be taken prior to it being approved.
- **“My Pending Requisitions”** is no longer available in the User Profile drop-down menu.



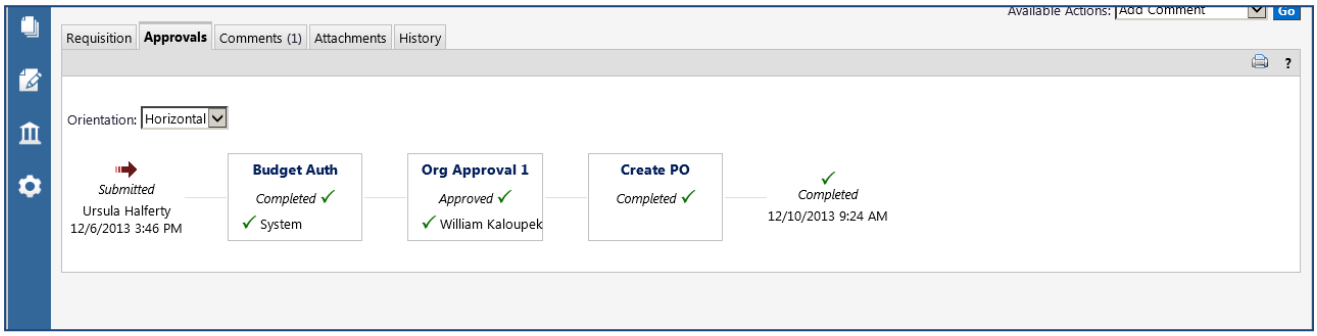
- Click on the “History” tab, the withdrawn message can be viewed.



Approvals and Workflow

Users are able to see the workflow process for all PRs by selecting the **"Approvals"** tab in the left-hand corner of the screen**.**

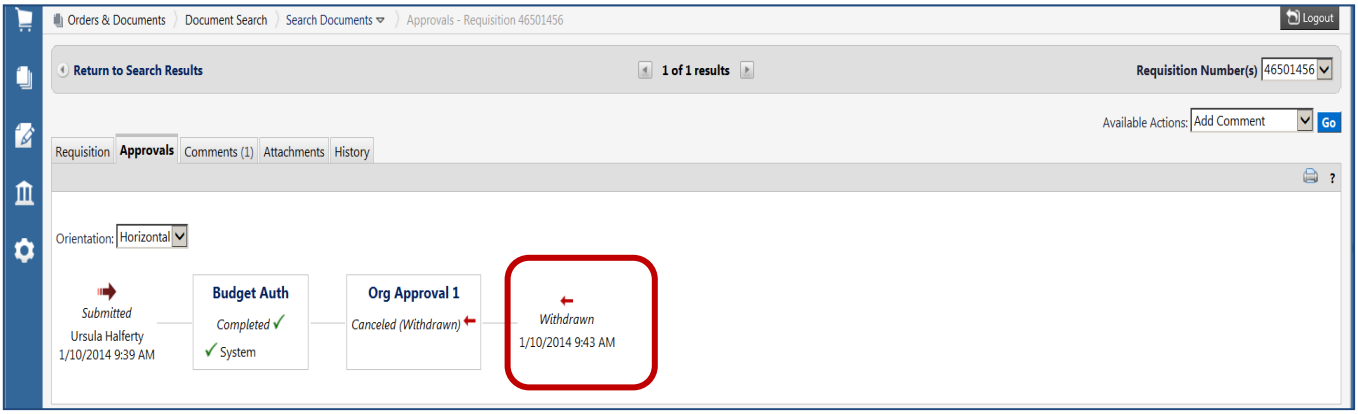
Outlined below is a sample workflow steps necessary to complete a PR and create the PO.



Depending on the type of item being requested, additional steps may be shown in the workflow (Principle Investigators, Sponsored Programs, EHSS).

IMPORTANT: PR has not become a PO until the green checkmark ✓ and "Completed" has a date and time shown.

Below is an example of a PR workflow for a requisition that has been withdrawn. It is identified with the red arrow ← and the word **"Withdrawn."** The date and time are also listed.



Delegated Purchasing Authority

University **Policy 3015, Contract Signature Policy and Procedures**, delegates to department heads the authority to enact purchases of goods and services valued up to $2,000 per transaction. Department heads may select faculty and staff within their department to exercise this authority. However, the department head remains responsible for the correct exercise of delegated purchasing authority and must ensure that personnel are properly trained and supervised; that all rules and procedures are followed; and that prices being paid are fair and reasonable.

At dollar amounts up to $2,000, price competition among vendors is not required, but is certainly encouraged. Once the vendor is selected, a firm fixed price, inclusive of all charges for handling, shipping, tax (if any), etc., should be determined and a HokieMart requisition prepared.

For more information on this topic visit the Procurement web-site:
http://www.procurement.vt.edu/Department/Procedures/Intro.html

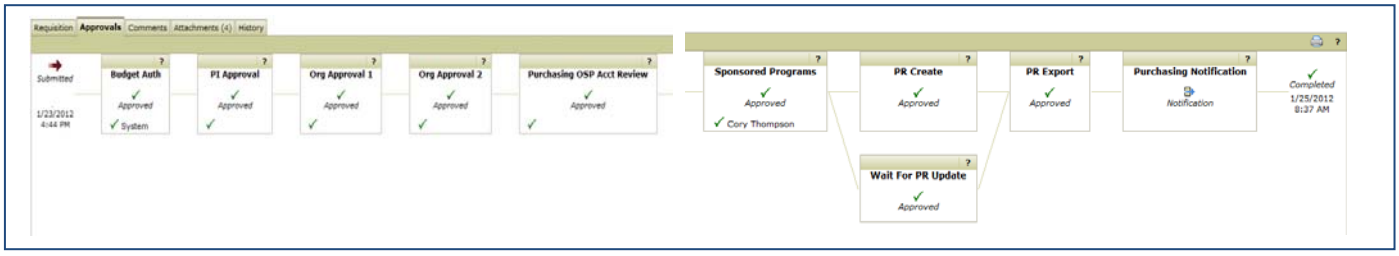
Purchase Requisitions Exceeding $2,000

When a Purchase Requisition (PR) exceeds the two-thousand dollar ($2,000) limit:

- and is on the Non-Catalog Item form or
- the supplier is not a contract supplier

the PR will automatically be sent to the Procurement Department after approval(s) by the organization. The buyers in the Procurement Department will process the PR.

- An External Requisition number (Req #), always beginning with an "R" (ex. R0005942), will be assigned to the PR.
- A buyer in the Procurement Department will be assigned to the PR and will perform the procurement function.



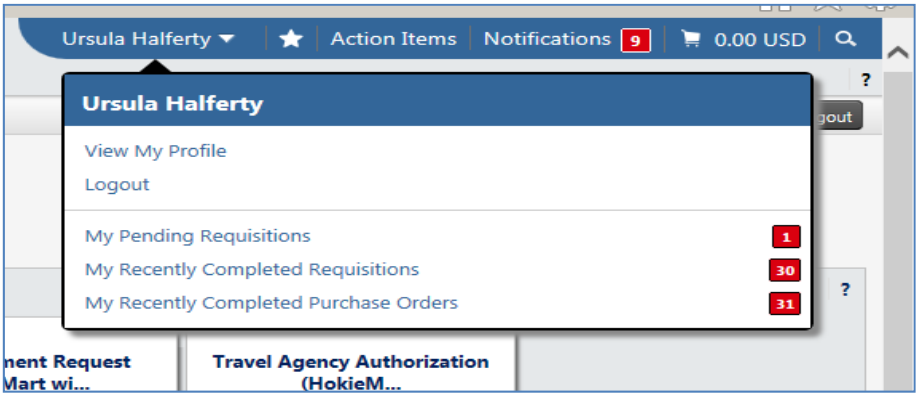
General

Status	Completed (1/25/2012 8:37 AM)
Submitted	1/23/2012 4:44 PM
Cart Name	2012-01-23
Priority	Normal
Leave date blank unless next fiscal year order (then enter 07/01/2012)	no value
Prepared by	
Work Order Number	N/A N/A
External Req #	R0021223

If you wish to know the status or the buyer assigned to this PR, please phone Nancy Luz at 540-231-6221 or email nluz@vt.edu.

The user will need to provide the External Req. #.

Purchase Requisition Actions



To view the status of a Purchase Requisition (PR):

- Click on User Profile to activate the drop down menu.
- Click on the desired option "My Pending Requisitions," "My Recently Completed Requistions," or "My Recently Completed Purchase Orders."
    - My Pending Requisitions option will only display if there is a requisition pending.

Symbols for the various actions in HokieMart are as follows:

✓ PR has been approved

✗ PR has been rejected

PR has been partially rejected

PR is still in progress

← PR has been withdrawn

	11385172	McMaster Carr Supply Company	2009-06-12 Scott Shop Supplies	2/7/2012 1:26 PM	630.85 USD
	27564337	Guy Brown Products	Guy Brown - LCR	2/7/2012 1:25 PM	13.80 USD
✓	27564422	Leslie A Harless	2012-02-07	2/7/2012 1:25 PM	4.36 USD
✓	27520434	Heavener Hardware Lumber & Rental	Heavener -	2/7/2012 1:24 PM	67.00 USD
✗	27564029	Copernicus.org	2012-02-07	2/7/2012 1:24 PM	0.00 USD
✓	27564375	Food City	2012-02-07	2/7/2012 1:23 PM	17.67 USD
✓	27564223	Citizens Telephone Cooperative	2012-02-07	2/7/2012 1:21 PM	42.18 USD
✓	27564092	Kristopher Ryan Brown	2012-02-07	2/7/2012 1:21 PM	31.37 USD
✓	27564159	Beckman Coulter, Inc.	2012-02-07	2/7/2012 1:20 PM	42.00 USD

Cancel A Purchase Order or Line Item(s)

To cancel the Entire Purchase Order

- Create a cancelled receipt in HokieMart for all cancelled item(s) or the entire PO. Add a statement in the receipt notes with the reason for the cancellation.

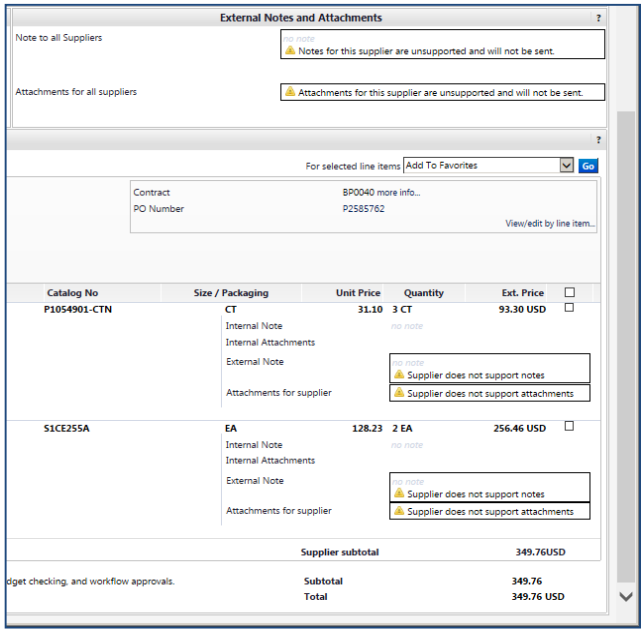
- If HokieMart cancellation is done correctly, no further action is required.
- Notice of cancelled receipts will automatically be sent to the Procurement Department

DO NOT email HokieMart to cancel the PO

- A cancelled receipt must now be processed for all purchase orders: Punchouts, Non-Catalog Item, ISRs, IPRs, TAAs, Reimbursements, and Direct Pays.
- The Requestor/User must contact supplier directly to cancel the PO or line item(s).
- For more details on performing cancelled receipts, please see the Receiver Guide: http://www.procurement.vt.edu/HokieMart/UserGuides/receiver.pdf.

HokieMart Purchase Orders Sent Via CXML

CXML: computer to computer



HokieMart suppliers (many Punchouts) that receive their orders via CXML do not provide a link to add a "Note to all Suppliers" or "Attachments for all suppliers." Warning messages will block this capability. Because the POs are transmitted computer to computer, these notes/attachments are not read. NO CXML suppliers accept attachments. Below are the warning notices:

NOTE: Suppliers that do not use the CXML distribution method, are not subject to this restriction. If you need to add a note or comment use the Non-Catalog Form to submit your order to the vendor.

With CXML orders user are not able to choose "Ship Via" method or "Requested Delivery Date."

Delivery Options
edit
Ship Via
Best Carrier-Best Way
Ship Via for the following suppliers is unsupported will not be sent: Concerto Office Products LLC

Requisition and Purchase Order Follow-up

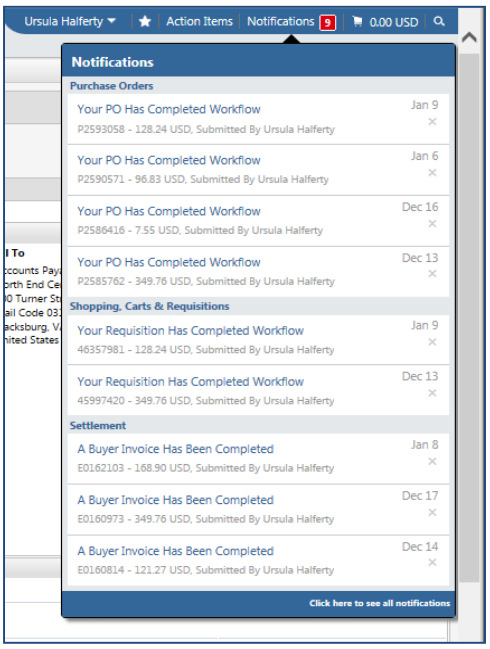
The user (requisitioner) is responsible for follow-up of the PR and PO. This follow-up allows the user to view the progress and delivery of the PO to the vendor**.**

Please do not assume that the PR became a PO or that the PO was distributed to the supplier.

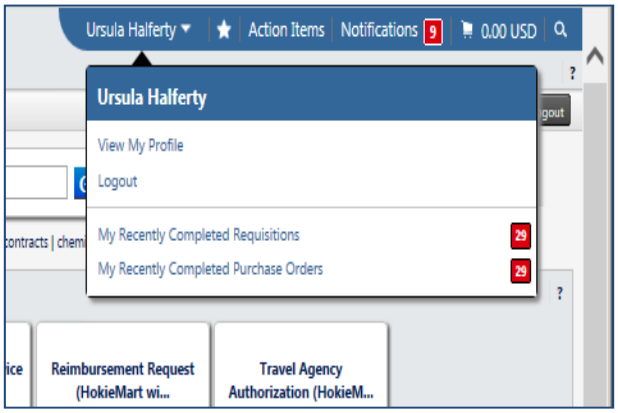
PR Follow-up

From the Main Screen of HokieMart:

New Search for the PR No. from drop-down menu in the upper right-hand corner.


Ursula Halferty
Action Items
Notifications 9
0.00 USD
Notifications
Purchase Orders
Your PO Has Completed Workflow
P2593058 - 128.24 USD, Submitted By Ursula Halferty
Jan 9
Your PO Has Completed Workflow
P2590571 - 96.83 USD, Submitted By Ursula Halferty
Jan 6
Your PO Has Completed Workflow
P2586416 - 7.55 USD, Submitted By Ursula Halferty
Dec 16
Your PO Has Completed Workflow
P2585762 - 349.76 USD, Submitted By Ursula Halferty
Dec 13
Shopping, Carts & Requisitions
Your Requisition Has Completed Workflow
46357981 - 128.24 USD, Submitted By Ursula Halferty
Jan 9
Your Requisition Has Completed Workflow
45997420 - 349.76 USD, Submitted By Ursula Halferty
Dec 13
Settlement
A Buyer Invoice Has Been Completed
E0162103 - 168.90 USD, Submitted By Ursula Halferty
Jan 8
A Buyer Invoice Has Been Completed
E0160973 - 349.76 USD, Submitted By Ursula Halferty
Dec 17
A Buyer Invoice Has Been Completed
E0160814 - 121.27 USD, Submitted By Ursula Halferty
Dec 14
Click here to see all notifications

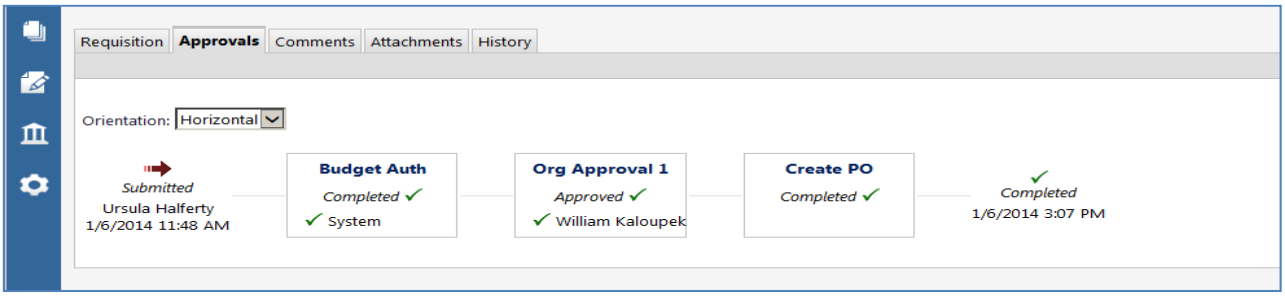
- Under Notifications or
- Under User Profile Option



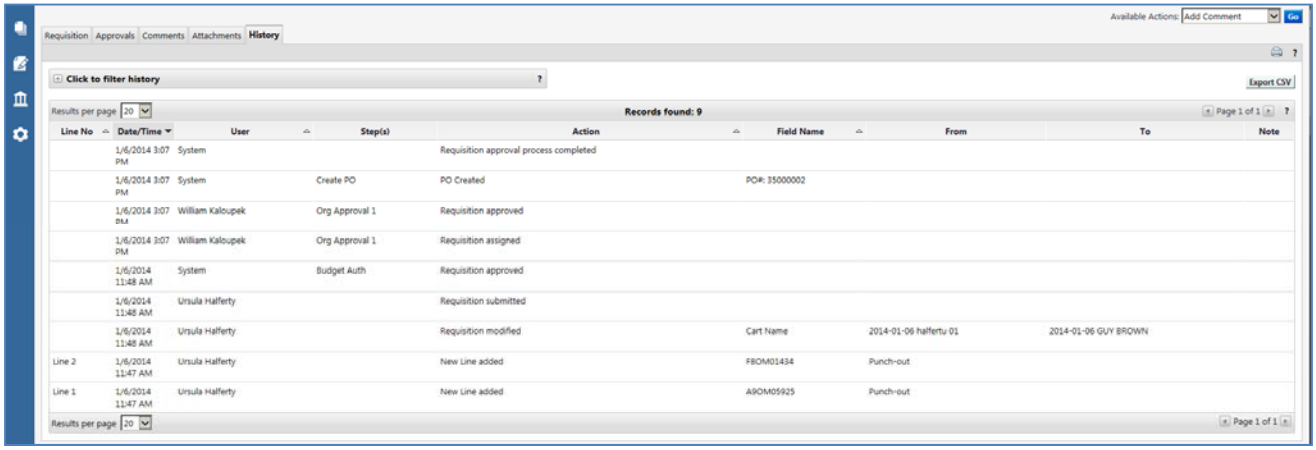
- Choose and click to select the PR.

Click “Approvals” or “History” tab to follow the status of the PR from entry by Requestor until a temporary HokieMart PO is assigned.

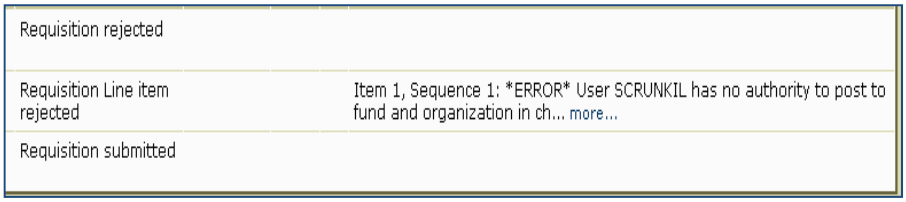
- Using the “Approvals” tab, a check mark will appear in each workflow step as it is completed.



- Using the “History” tab view: The PO number is displayed in this view.


Requisition
Approvals
Comments
Attachments
History
Available Actions: Add Comment
Go
Click to filter history
Export CSV
Results per page 20
Records found: 9
Page 1 of 1
Line No
Date/Time
User
Step(s)
Action
Field Name
From
To
Note
1/6/2014 3:07 PM System Requisition approval process completed
1/6/2014 3:07 PM System Create PO PO Created PO#: 35000002
1/6/2014 3:07 PM William Kaloupek Org Approval 1 Requisition approved
1/6/2014 3:07 PM William Kaloupek Org Approval 1 Requisition assigned
1/6/2014 11:48 AM System Budget Auth Requisition approved
1/6/2014 11:48 AM Ursula Halferty Requisition submitted
1/6/2014 11:48 AM Ursula Halferty Requisition modified Cart Name 2014-01-06 halfertu 01 2014-01-06 GUY BROWN
Line 2 1/6/2014 11:47 AM Ursula Halferty New Line added F8OM01434 Punch-out
Line 1 1/6/2014 11:47 AM Ursula Halferty New Line added A9OM05925 Punch-out
Results per page 20
Page 1 of 1

If the HokieMart PO does not appear, an error message(s) (example below) will appear in the “History.”


Requisition rejected
Requisition Line item rejected
Item 1, Sequence 1: *ERROR* User SCRUNKIL has no authority to post to fund and organization in ch... more...
Requisition submitted

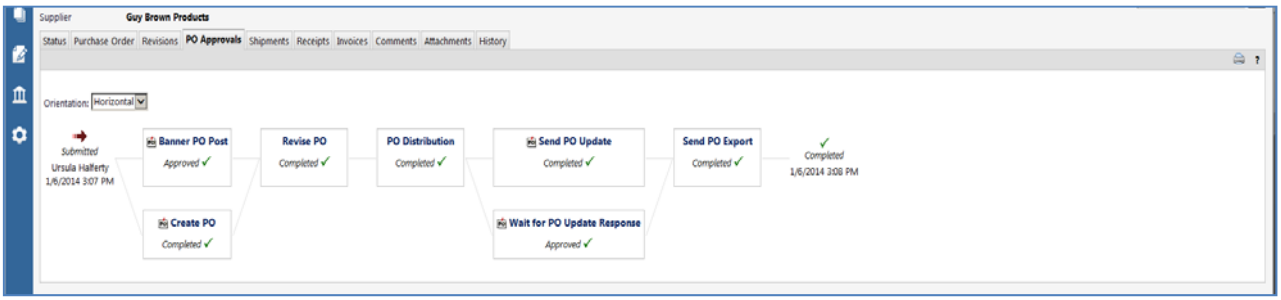
When no temporary PO is created, Requestor must correct error, copy the cart, and resubmit the PR.

PO Follow-up

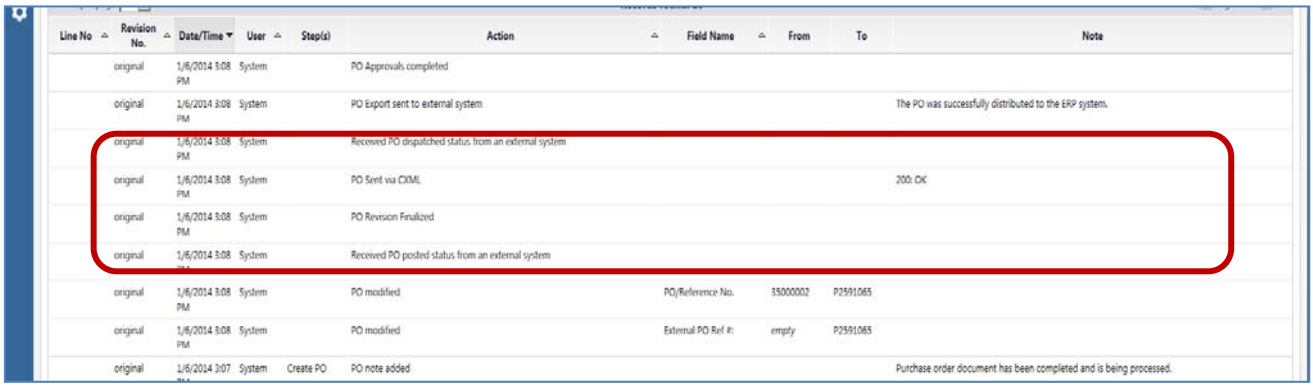
From the Main Screen of HokieMart:

- Search for the PO No. from drop-down menu in the upper right-hand corner.
  - Under Notifications or
  - Under User Profile Option
- Choose and click to select the PO.
- PO will be displayed.
- Click “PO Approvals” or “History” tab to follow the status of the PR from entry by Requestor until a temporary HokieMart PO is assigned.

- Click “PO Approvals” tab to confirm that the PO completed the work flow.



Click the “History” tab to view and verify that the order was electronically sent to the vendor.



Line No	Revision No.	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	original	1/6/2014 3:08 PM	System		PO Approvals completed				
	original	1/6/2014 3:08 PM	System		PO Export sent to external system				The PO was successfully distributed to the ERP system.
	original	1/6/2014 3:08 PM	System		Received PO dispatched status from an external system				
	original	1/6/2014 3:08 PM	System		PO Sent via CXML				200: OK
	original	1/6/2014 3:08 PM	System		PO Revision Finalized				
	original	1/6/2014 3:08 PM	System		Received PO posted status from an external system				
	original	1/6/2014 3:08 PM	System		PO modified	PO/Reference No.	35000002	P2591065	
	original	1/6/2014 3:08 PM	System		PO modified	External PO Ref #:	empty	P2591065	
	original	1/6/2014 3:07 PM	System	Create PO	PO note added				Purchase order document has been completed and is being processed.

Methods of PO Delivery

The three methods of delivery are:

Computer To Computer

This example PO was delivered via CXML (computer-to-computer) on November 20, 2013 at 4:21 pm

original	11/20/2013 4:21 PM	System	PO Sent via CXML	200: OK

FAX

original	9/10/2008 11:10 AM	System	Delivery Notification →	Delivered to: +1 (804) 378-6210 Date and time of delivery: Sep 10, 2008 11:10:49 AM Number of pages ... more...
original	9/10/2008 11:06 AM	System	PO Sent via fax	Out for fax delivery to +1 (804) 378-6210

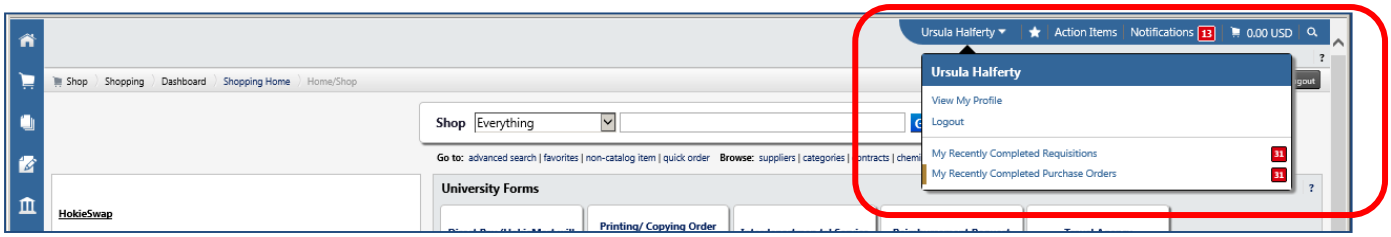
EMAIL

PO Sent via HTML attached email	dpc2@exchange.vt.edu

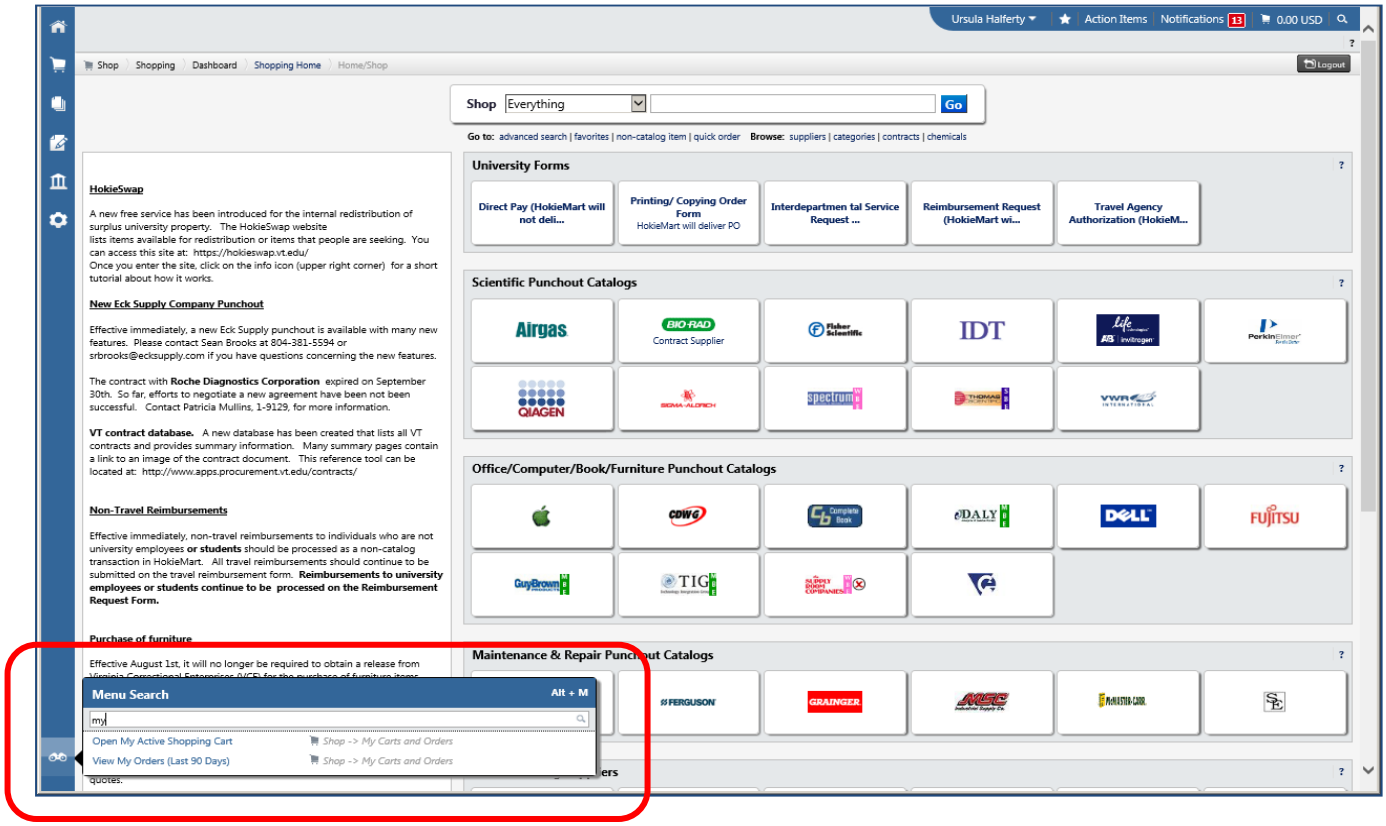
If you do not receive one of these three delivery options messages, contact the HokieMart Help Desk (**hokiemart@vt.edu**).

Searching by PR and PO History

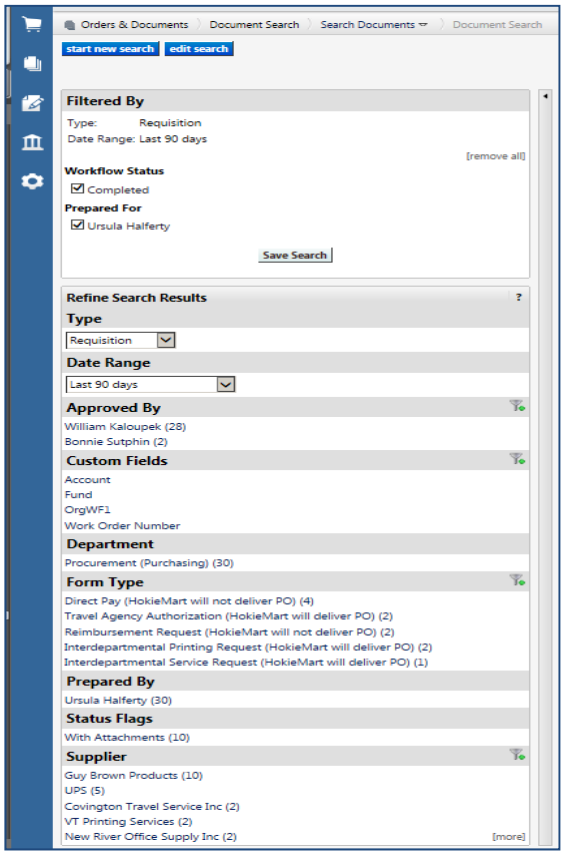
PRs and POs can be viewed for 90 days after completion using the drop down menu located under the user profile



Or they can be found by using the Search Menu icon (Alt + M) located on the lower left hand corner of the screen. A keyword search returns a list of pages containing the desired keyword. Search results are clickable to take you directly to the desired search page.



PRs and POs prepared prior to 90 days can be accessed with a history query. The best method of searching is to search by PR History. This will provide users with all requisitions that have been submitted. This will display PRs if they have not yet been approved and POs if they have been approved.



Users have the ability to search

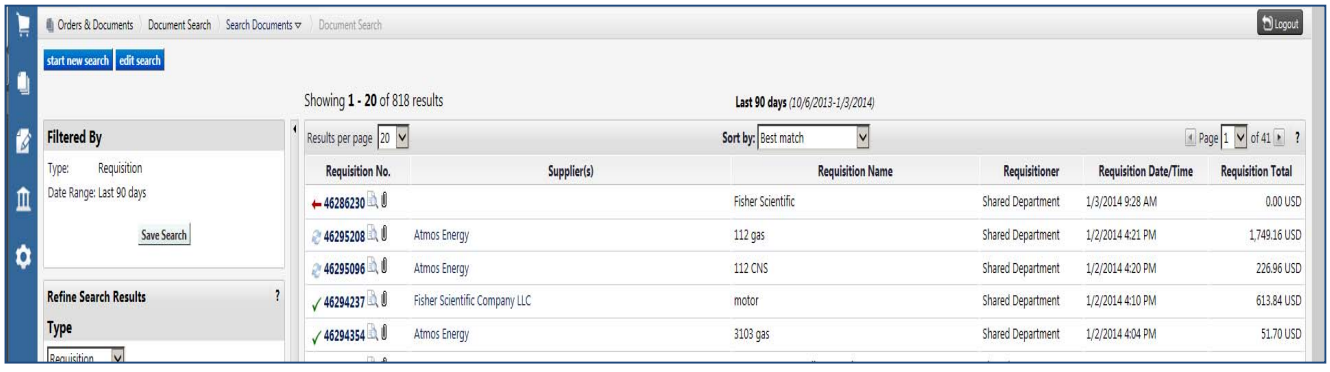
- "Prepared for"
- "Prepared by"
- "Type"
- "Date Range"
- "Approved by"
- "Custom Fields"

  ☞Users may also search by particular Accounts or Funds.
- "Department"
- "Form Type"
- "Prepared by"
- "Status Flag"
- "Supplier".

- Select the desired search options.

Quick Document Preview

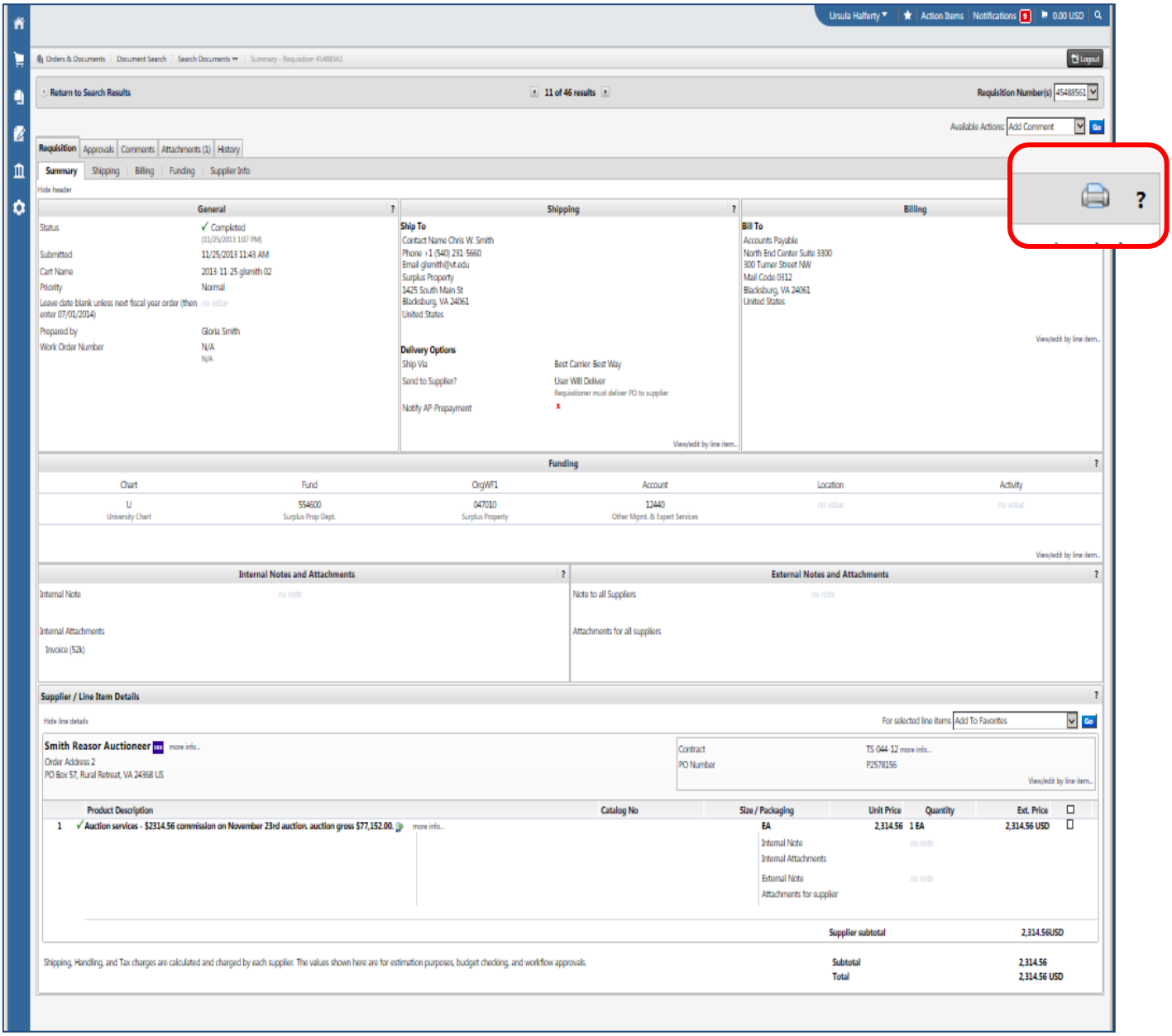
When viewing search results for PRs and POs, the user will be able to see a quick "preview" of the document. A small icon will appear next to each Requisition or Purchase Number. Click on this icon to view an overlay that displays information about that document.


Orders & Documents
Document Search
Search Documents
Document Search
Logout
start new search
edit search
Showing 1 - 20 of 818 results
Last 90 days (10/6/2013-1/3/2014)
Filtered By
Type: Requisition
Date Range: Last 90 days
Save Search
Refine Search Results
Type
Results per page 20
Sort by: Best match
Page 1 of 41
Requisition No.
Supplier(s)
Requisition Name
Requisitioner
Requisition Date/Time
Requisition Total
46286230 Fisher Scientific Shared Department 1/3/2014 9:28 AM 0.00 USD
46295208 Atmos Energy 112 gas Shared Department 1/2/2014 4:21 PM 1,749.16 USD
46295096 Atmos Energy 112 CNS Shared Department 1/2/2014 4:20 PM 226.96 USD
46294237 Fisher Scientific Company LLC motor Shared Department 1/2/2014 4:10 PM 613.84 USD
46294354 Atmos Energy 3103 gas Shared Department 1/2/2014 4:04 PM 51.70 USD

The preview contains document-specific information that will help the user identify the required PR or PO without leaving the search results screen.

The “Quick View” will display.

Note: the print icon is available for the user to print a copy of requisition if necessary.



Document Search Options

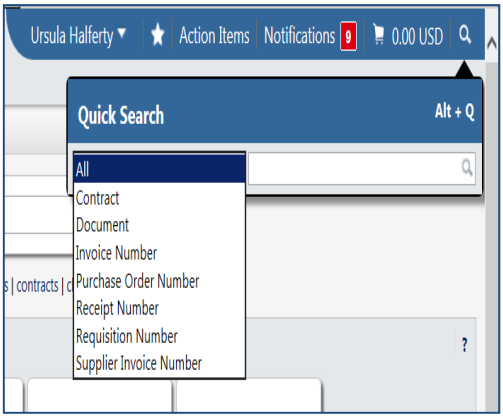
The document search feature is a useful tool providing users with the ability to search all documents. The search feature includes Purchase Requisitions, Purchase Orders or Invoices, plus other options.

There are various methods to search for documents in HokieMart.

Quick Search

In the upper-right portion of the screen, a magnifying glass icon (Atl + Q).

- From the drop-down listing, select **Documents** and enter the known number information. By selecting **Documents**, **ALL** types of documents will be searched. When complete, click "Go".



The matching document will be displayed. Also displayed will be the current status of the document in the workflow. The example displayed below is still pending.

Advanced Document Search Feature

There are several ways to access the advanced Document Search feature. This feature provides the user with the ability to conduct more detailed searches. Users may select any of the search available options from the drop-down list provided.

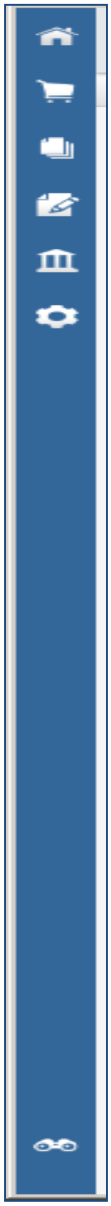
Note: There is also an Advanced Search (as shown below) which allows users to search and view items for shopping. The search discussed in this section is the advanced Document Search feature.

An added benefit to the advanced documents search feature is it allows users to view the funding of a particular PR or PO.

How To Access Advanced Document Search

New

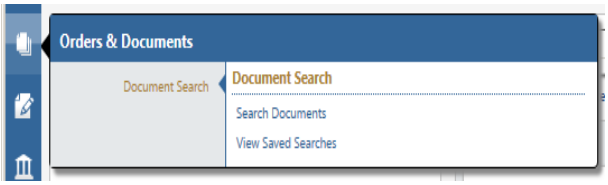
Menu Search Option



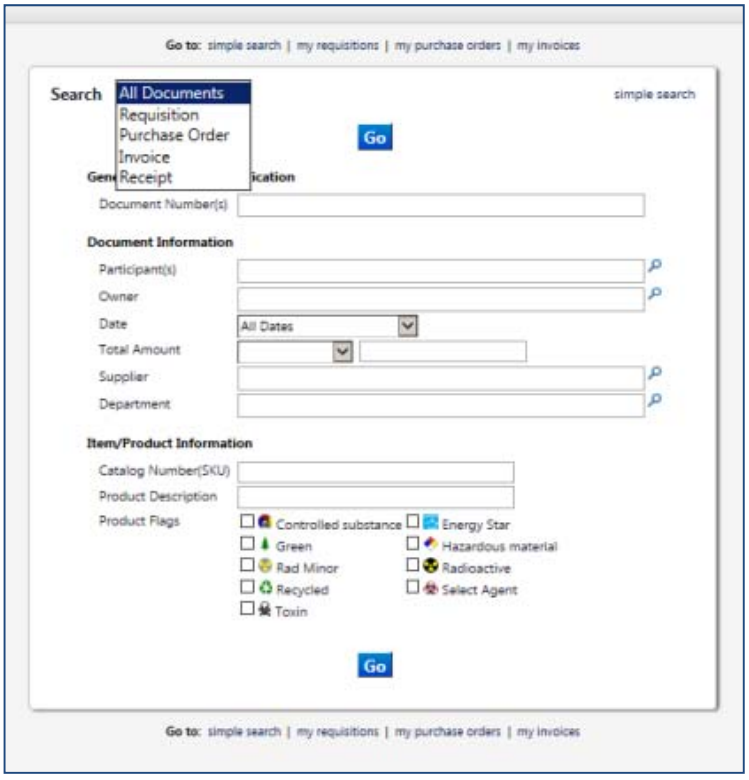
In the new Phoenix User Interface there are several different ways to locate and access the Advanced Document Search feature. The Advanced Search screen and functionality have not changed from the Classic View.

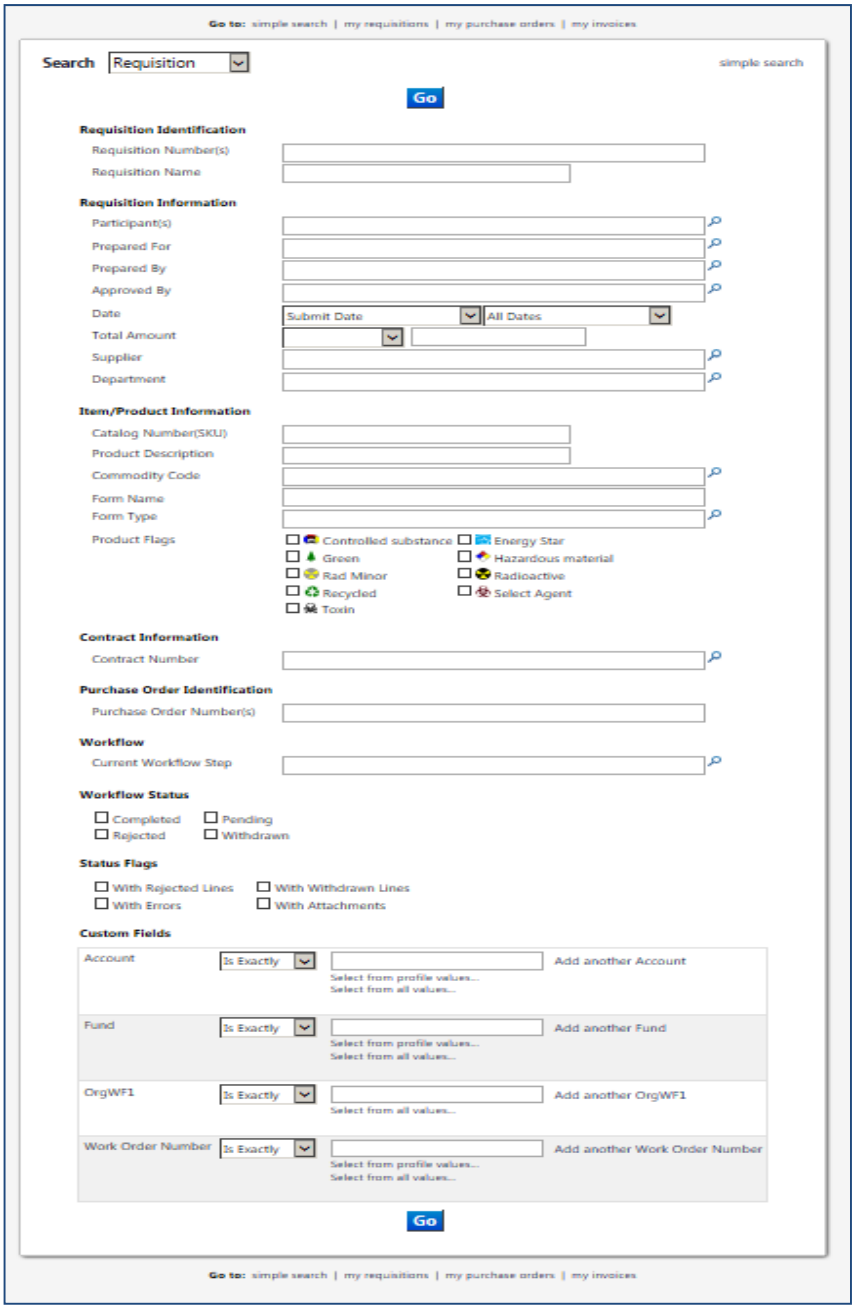
On the side bar locate and click on either the:

- the Orders & Documents icon (upper left side of the screen):



- the Menu Search icon (lower left side of the screen). By simply typing in the letter "s" a list of search options will appear in the **Menu Search** box. Choose "Search Documents."





In order to view funding information, select Requisitions or Purchase Orders, Invoice or Receipts from the available drop-down list. Each option will provide different search fields that are appropriate for the search option selected.

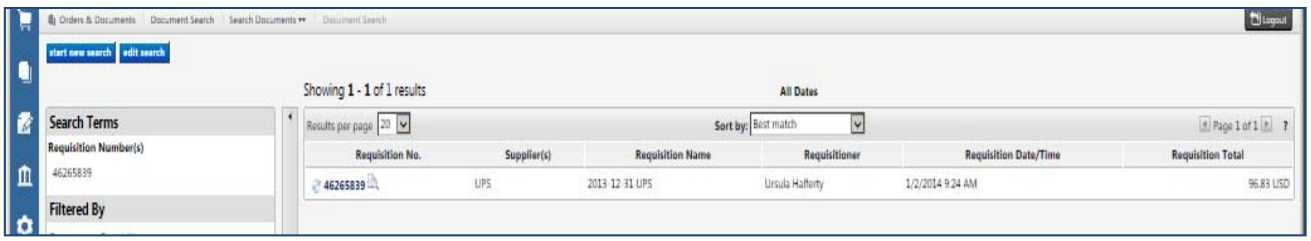
In these screens the user has the ability to provide as much information as necessary to retrieve results.

In this example "Requisition" was selected as the option.

Some fields provide a drop-down menu to assist in searching.

- Click "Go".

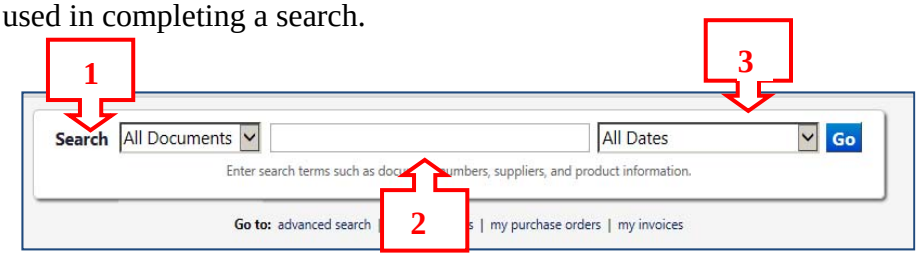
Results are then displayed.



By selecting on a specific requisition number, details for that requisition will be displayed. Once selected, a screen will display allowing for various selections to be made.

Simple Document Search

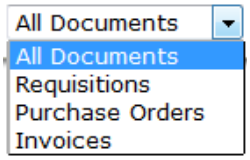
A simple search option is available by clicking on the words “simple search” in the upper right hand corner of the Search Documents screen. A limited search window will display. There are three fields which may be used in completing a search.



1. **Search:**

There is a drop-down option available to select a particular type of document to search. Leaving set to all will display all types.

- All documents (this will include all combinations listed below)
- Requisitions
- Purchase Orders
- Invoices (only includes invoices where vendors electronically invoice - eInvoices)



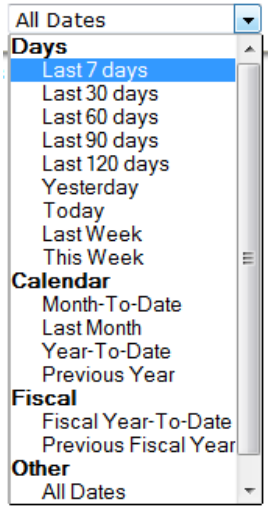
2. **Center:**

The center field allows users to enter specific information. By selecting a particular document type and entering unique information specific results will be returned.

Information that may be entered based on search selection:

- Requisition Number
- Requisition Name
- Purchase Order Number
- Invoice Number
- Supplier Invoice Number
- Contract Number
- Catalog Number
- Supplier Name

3. Date Range:

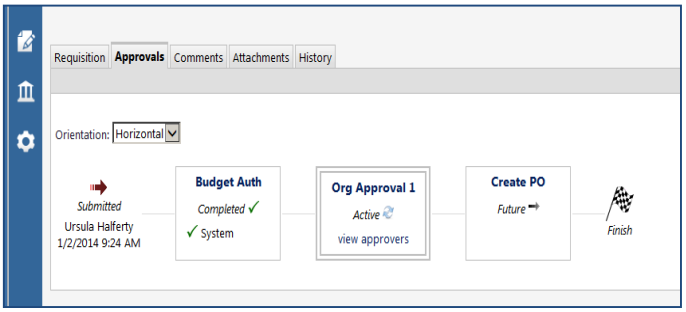


Users will also be able to identify a specific date range. There are several options to select from.

Remember, results returned will be drastically affected by the date range selected.

View Approvers

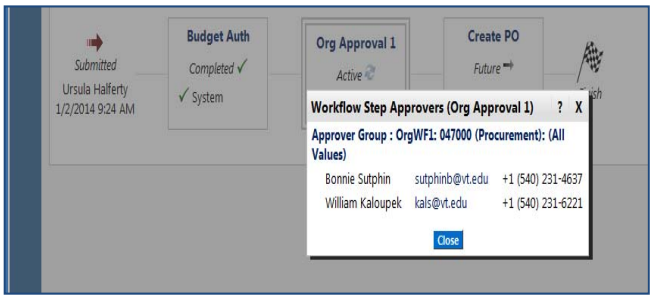
A Requestor has the ability to see all available approvers in each step of the workflow. This will allow the Requestor to contact the Approver for various reasons including expediting the requisition.



- Select a particular requisition.
- Click "Approvals" tab on the PR or PO.
- Click "view approvers."

All Requestors can view authorized Approvers in any step of the workflow.

- Do not assume that the PO has been delivered to the supplier.
- Click on "History" tab to verify the delivery.



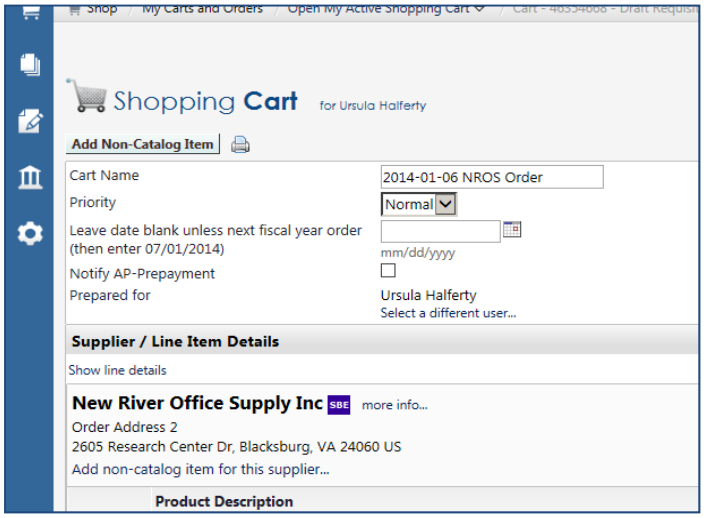
Miscellaneous Topics

On-Behalf-Of Requestor

An On-Behalf-Of (OBO) Requestor prepares a PR for a Requestor. There are two ways to add (OBO) Requestor information.

The first option is when the OBO Requestor is creating the shopping cart. But if that opportunity is missed, the information can be added during the PR review process before submitting for approval.

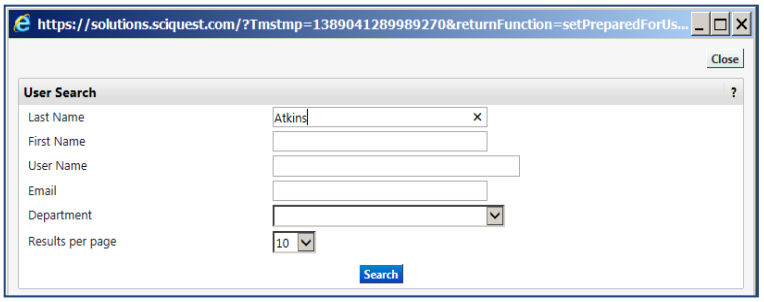
To perform this action in HokieMart while creating the Shopping Cart:



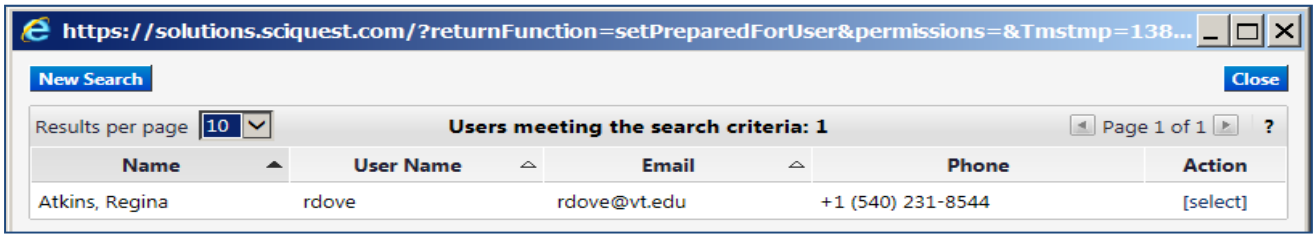
- Locate "Select a different user.."
- Click on that field to bring up a search window.

A pop-up box will open to choose the name of the Requestor for whom you are preparing the PR.

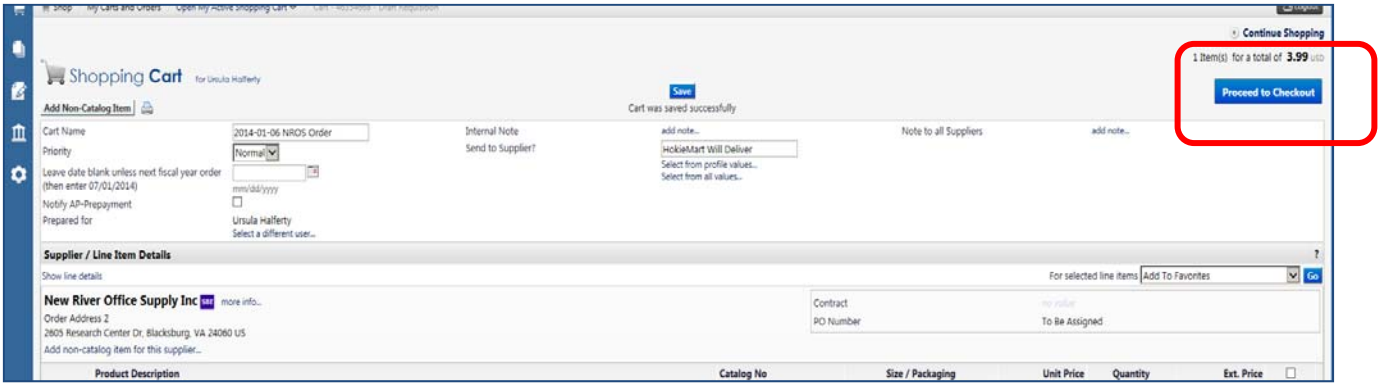
- Enter the individual's last name.
- If it is a common name, including the first name may be helpful to narrow the search.
- Click "Search."



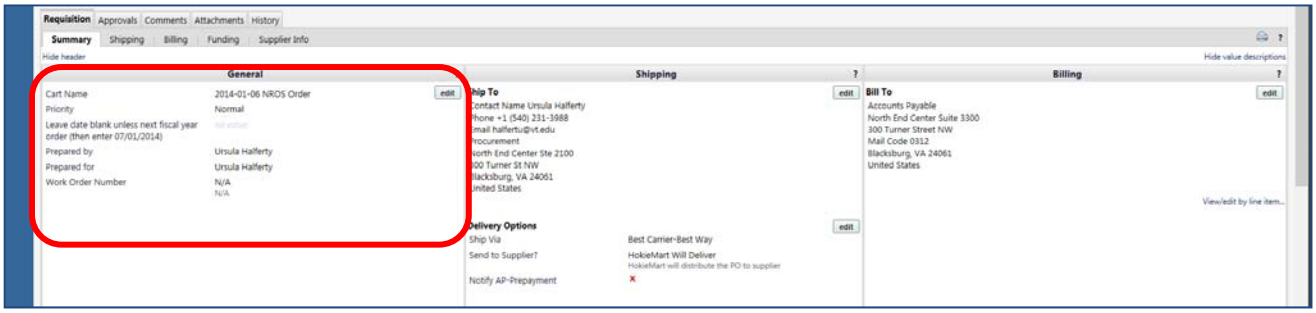
Possible choices will be returned in the search.



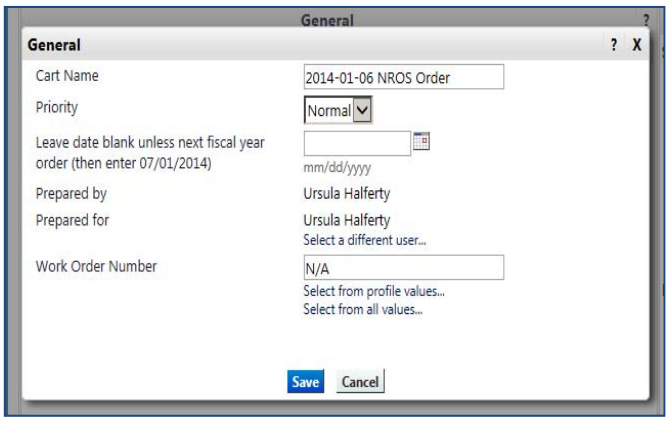
After adding the desired items to a Cart, the On-Behalf-Of (OBO) Requestor should click on the **"Proceed to Checkout"** button.



If the Prepared for Option was missed, once the PR has been created, the OBO Requestor must update the information contained in the **General** section block.

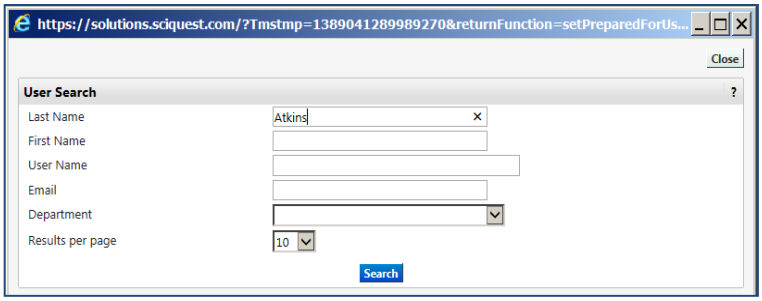


- The information contained in this block contains an additional field **"Prepared For"**.
- Click "Edit" to activate the General Section block.
- Click on "Select a different user" located just above the box Work Order Number.

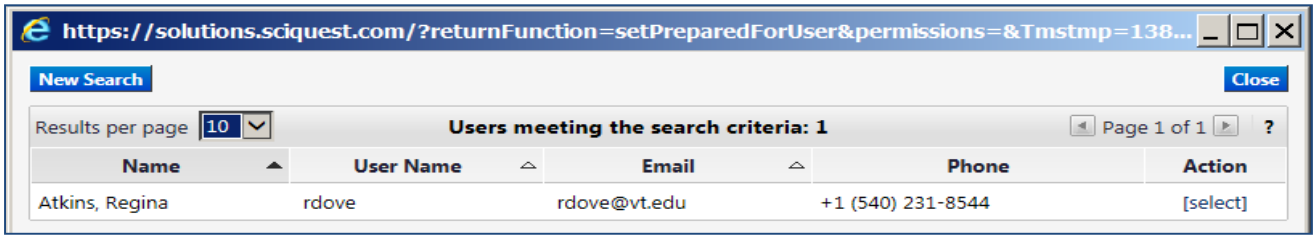


A pop-up box will open to choose the name of the Requestor for whom you are preparing the PR.

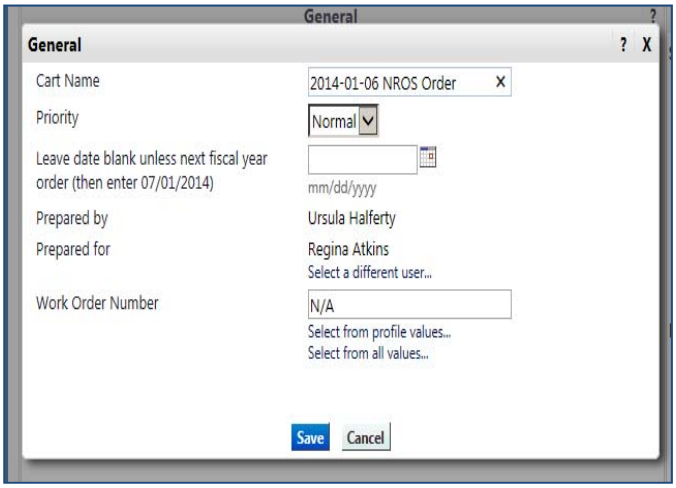
- Enter the individual's last name. If it is a common name, first name may be helpful.
- Click "Search."



Possible choices will be returned in the search.



- Under Action. Choose "select".
- This will populate a "Prepared For" name.
- When reviewing the cart, both "Prepared by" and "Prepared for" will be displayed.
- Click "Save" and continue to process the order as usual.



Adding a New Vendor/Supplier

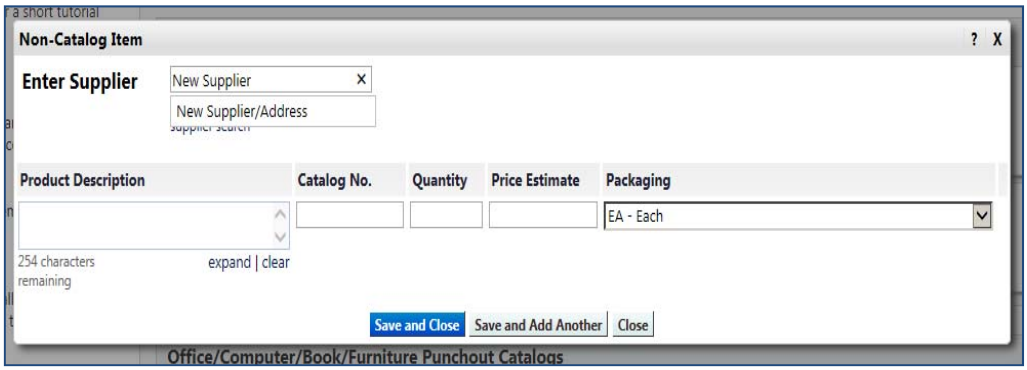
Sometimes the need arises to purchase from or use a vendor/supplier that is not currently listed in the HokieMart or Banner database. The Procurement Department must enter the vendor into the system, so the order can be processed through HokieMart and ultimately that the vendor can be paid through Banner.

TIP: **Note that a new supplier can be an individual or a corporate entity.**

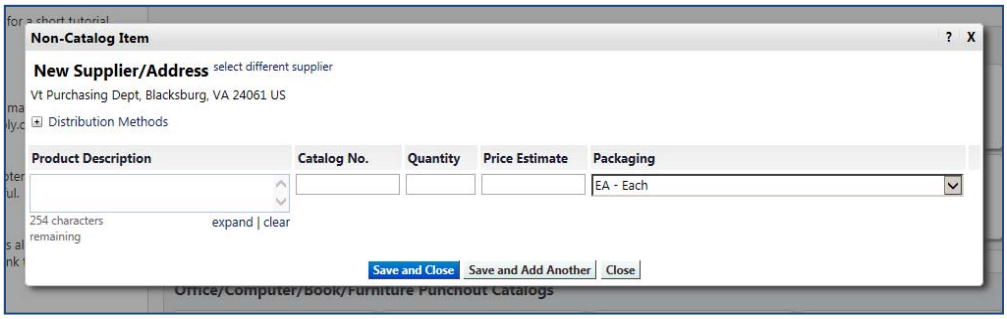
The requestor must select the appropriate form to process the order. The available form options for this type of situation would be either Non-Catalog Item or Reimbursement Request.

From the Main Screen of HokieMart for this example we will select Non-Catalog Item:

- Choose and click desired form.
- After a search for the supplier has been attempted type the words “New Supplier” in the Supplier box. This will bring up the “New Supplier/Address” option.



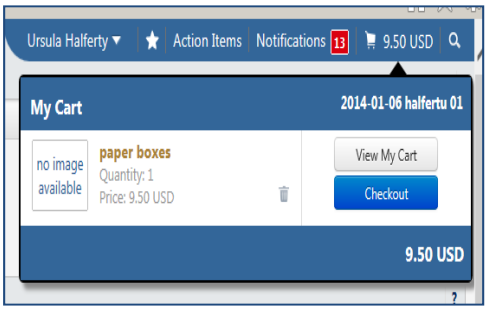
The selection will be VT Purchasing (Procurement) Department.



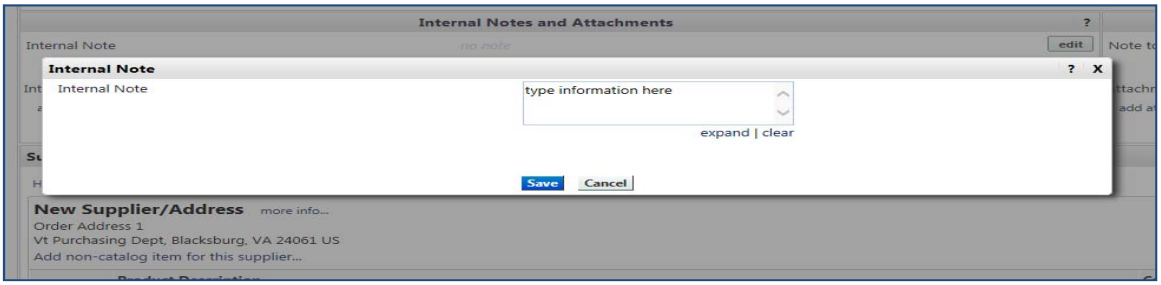
Continue to complete the information for the item, as usual:

- Provide description
- Catalog No. if necessary
- Quantity
- Price Estimate
- Packaging
- Click “Save and Close”

- Locate the “Cart” icon on the upper right hand corner of the page to activate the drop-down menu.
- Select:
    - “View My Cart” the user will now be in a Cart – Draft Requisition where the Cart can be reviewed and edited or
    - “Checkout” to proceed directly to the PR to submit



- Scroll down to **Internal Notes and Attachments** section on the left-hand side of the cart.
- Click “Edit.”
- An Internal Note box will open.
- Add address information, should be complete (see below).



In order to avoid delays processing the PR, the Procurement Department requests that the following information is provided to set up the New Supplier:

For Vendors

Put the following in the internal notes: vendor name; address; phone and fax number; and if available the FIN or banner id (each separated by a semi colon). If using a supplier website, provide the website address.

IMPORTANT – many HokieMart orders are faxed to suppliers.

- Click “Save.”
- Complete the PR.

For An Individual or Student

If the vendor/supplier is a VT faculty, staff or student please put the following in the internal notes: first and last name (middle initial when available); address; and banner id (each separated by a semi colon). If the individual is a student only the last 4 of the banner id should be provided.

- The first and last name
- Banner ID Number with the first 3 digits masked (XXX-456-789)

Due to PII policies <u>NEVER</u> include social security numbers in the Internal Notes.

- Click "Save."
- Complete the PR.

New Supplier /Vendor Follow Up

Follow the instructions for **Requisition and Purchase Order Follow-up.**

Procurement Department will add the new supplier if needed. If address already exists, Procurement will select the supplier and may add an internal note advising the user. Supplier will now be available for future use.

If the PR does not include the above supplier information, the PR will be rejected advising the department of the required information.

- The requestor will then copy the cart to a new cart and add all of the required information.

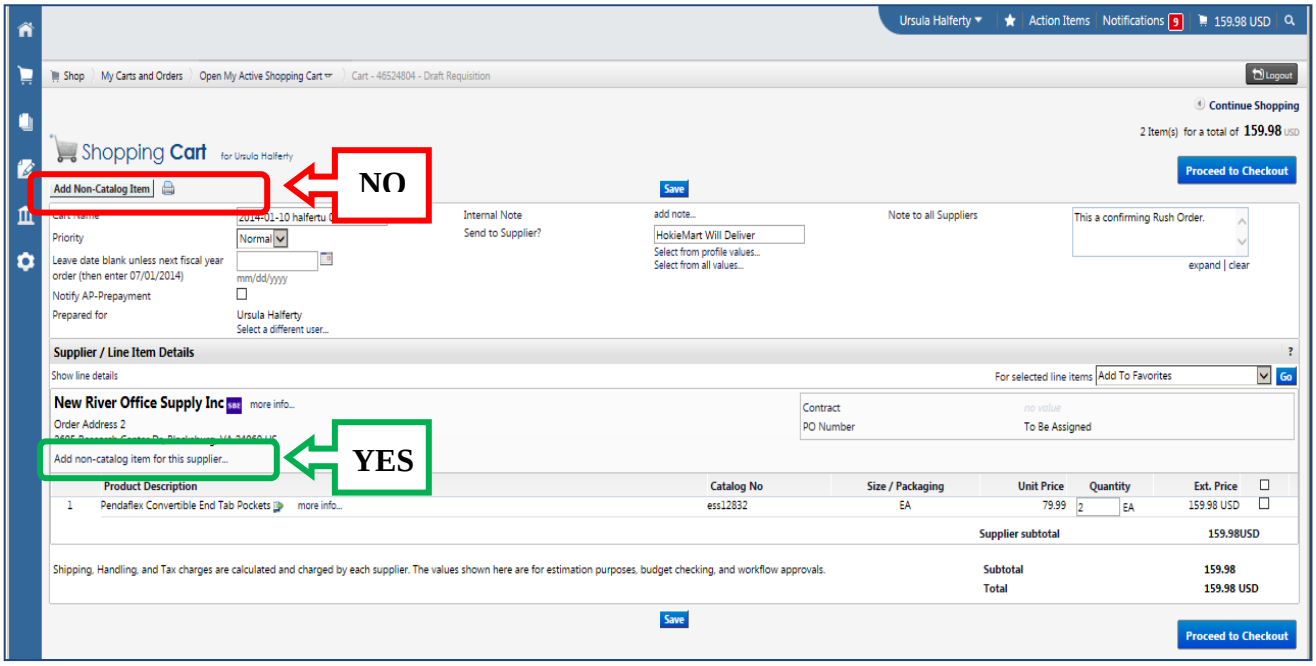
After the Procurement Department adds the new supplier, the PR will proceed through the approval workflow.

Adding Items to an Existing Cart

This feature is not available for Punchout vendors.

To add items to an existing active cart in the **Non-Catalog** form:

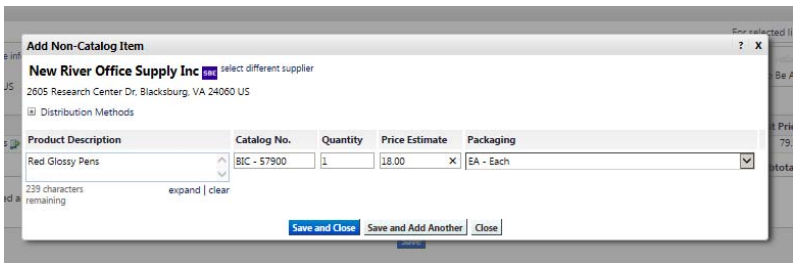
- Click on and use the time saving **"Add non-catalog item" for this supplier"** displayed below vendor address.



- **NO NOT USE the "Add non-Catalog Item" button on the top of the screen.** It requires extra steps and can cause the user to inadvertently create a mixed cart, which will not go through (it will fail) in HokieMart.

The non-catalog item screen will reopen, with supplier information populated.

- Add an additional item(s).



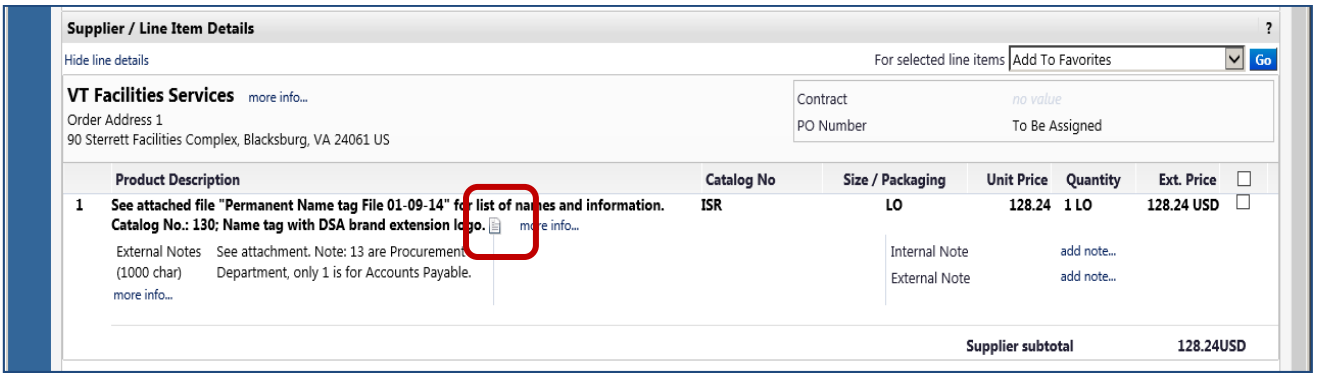
- Click "Save and Close."
- **OR** "Save and Add Another" (to add multiple items)

The additional item(s) will now be in the active cart.

All Other Forms

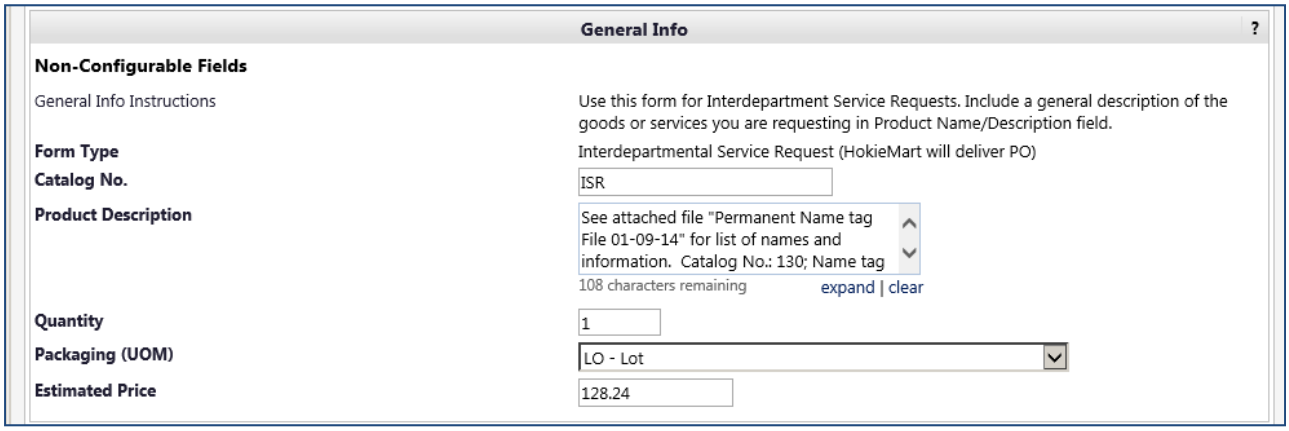
To add items to an existing active cart in **all other** HokieMart forms:

- Select the icon next to the product description.



The form will reopen.

- Update, delete information in General Info section.
- Update the Product Description section.
- Update Product Description, Quantity, Packaging, and Estimated Price.


General Info
Non-Configurable Fields
General Info Instructions
Use this form for Interdepartment Service Requests. Include a general description of the goods or services you are requesting in Product Name/Description field.
Form Type
Interdepartmental Service Request (HokieMart will deliver PO)
Catalog No.
ISR
Product Description
See attached file "Permanent Name tag File 01-09-14" for list of names and information. Catalog No.: 130; Name tag
108 characters remaining
expand | clear
Quantity
1
Packaging (UOM)
LO - Lot
Estimated Price
128.24

- At the top of the screen from the "Available Actions" click "Save."
- Or simply from the "Available Actions" drop-down list, choose "Add and go to cart".

The up-dated information will now be in the active cart.

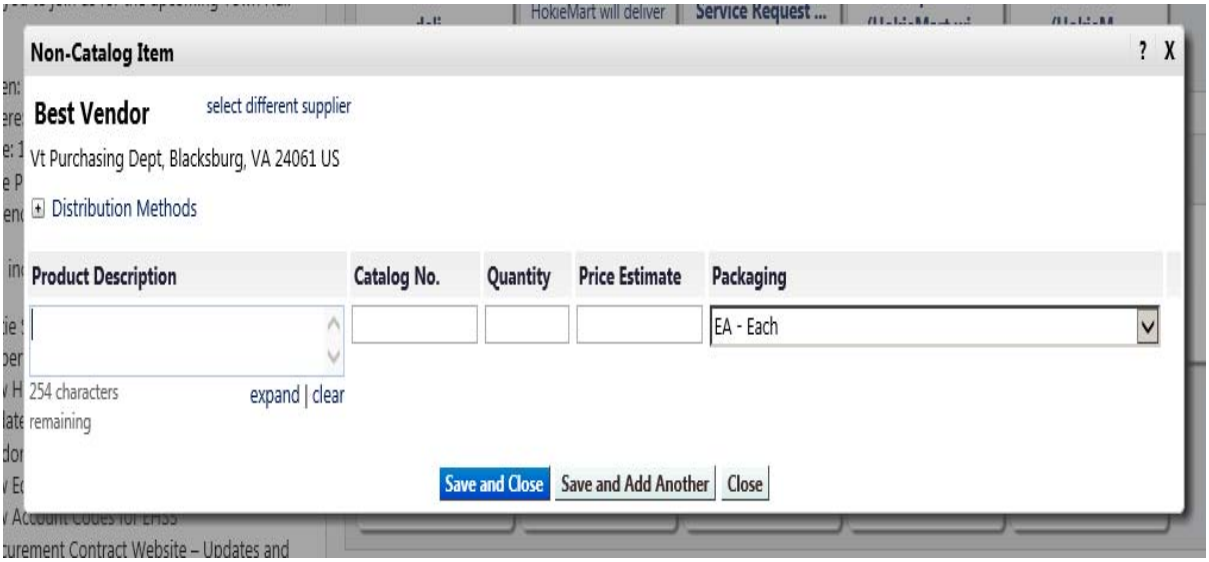
Best Vendor

When a department knows the item(s) that need to be ordered but are unsure of a supplier, a buyer in the Procurement Department can and will process the purchase order (PO). In order for the purchase requisition (PR) to be electronically delivered to Procurement, choose **Best Vendor** as the supplier.

From the Main Screen of HokieMart:

- Choose Non-Catalog form.
- Click "choose supplier."
- Type "Best Vendor" in the Supplier Name field.

Procurement will appear as the sole choice**.**



- Complete the PR.
- Follow the instructions for Requisition and Purchase Order Follow-up.

Note: **This is the only form where the dollar amount on the PRs may be equal to zero ($0.00).**

If the PR is for a term contract, the department will also select the **Best Vendor** supplier. A PR will then be created in Banner. The Procurement Department will use this PR as authorization to proceed with the contract process. The PR is usually cancelled after the contract has been established.

Creating Shared Department PRs

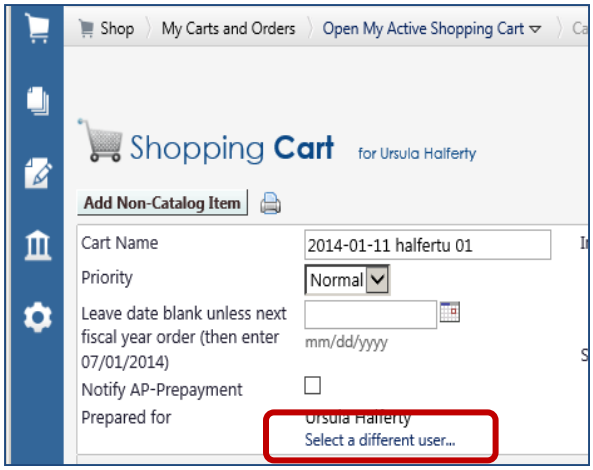
The purpose of a Shared Department PR is when a department is sharing the cost of purchasing particular goods or services with one or more departments.

> ***Note the steps to create a PR for a shared department are similar to the steps required to create a PR for an OBO requestor.***

There are two areas to capture and add the request for Shared Department PR.

Option #1

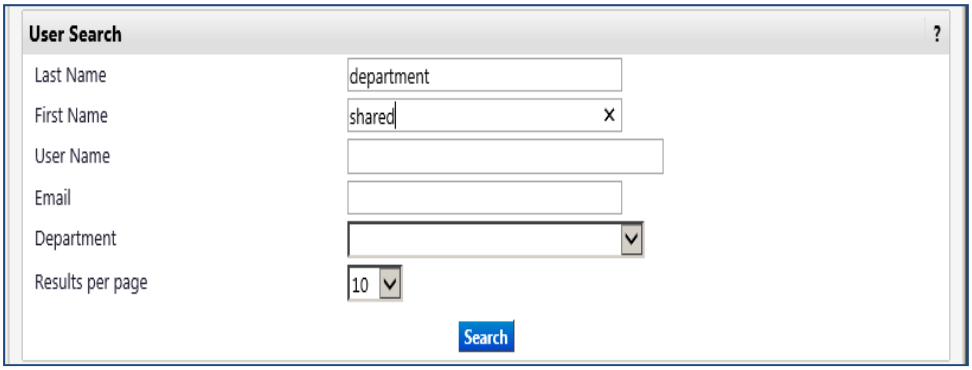
When initially creating the Shopping Cart and entering the Cart information.



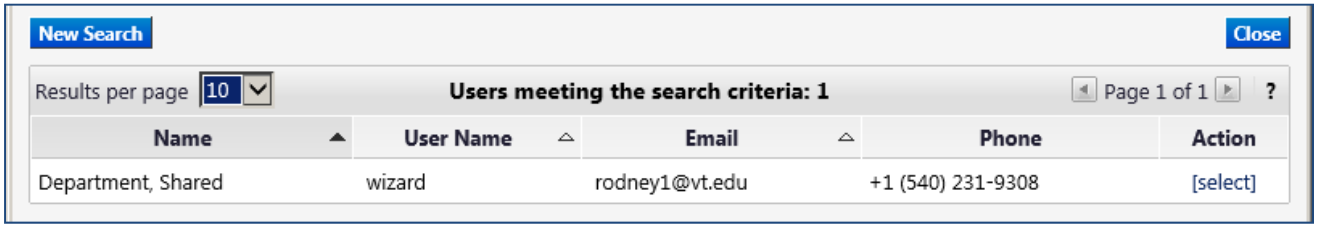
From the Main Screen of HokieMart:

- Select the desired form.
- Enter Supplier Name.
- Complete General Item Info section on the top of the form.
- Below the prepared for user name, click on **"Select a different user.."**

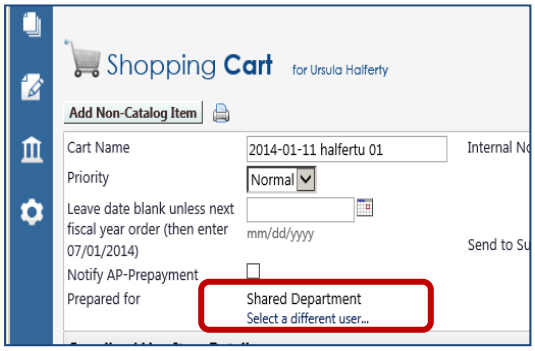
- **Search User** box will appear.



- A search results box will open.



- Click and select "Department, Shared"



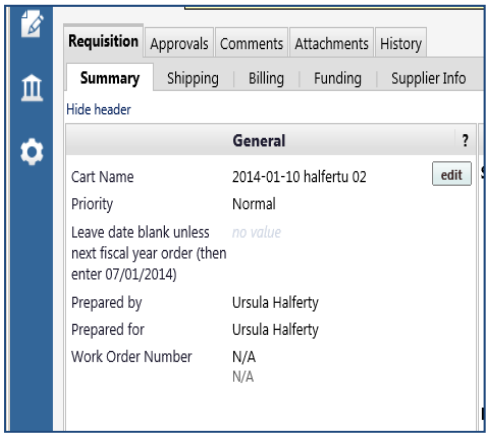
- This will return the requestor to the Cart.
- Continue to complete the Cart as usual.
- Click "Add and go to Cart" or "Add to cart and return."
- User will now be in the **Cart – Draft Requisition**
- Click "Proceed to Checkout."

Option #2

If the user forgot to create a Shared Department request while creating the Shopping Cart, the requestor has a second opportunity to input this information when in the **Cart – Draft Requisition**

- Either click "General" in the Guided Checkout bar

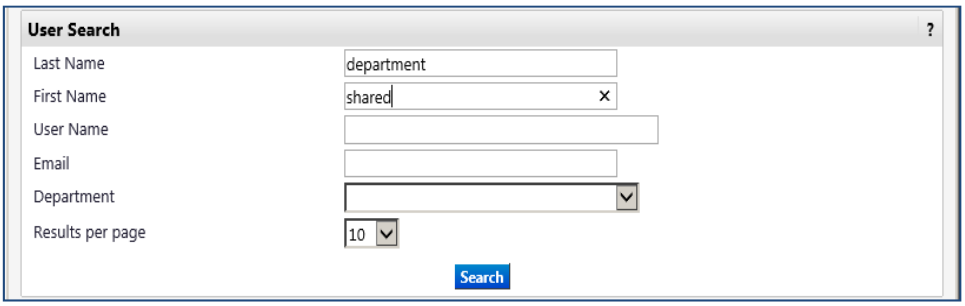
- Or click "edit" in the **General** information box.



The General box will open.

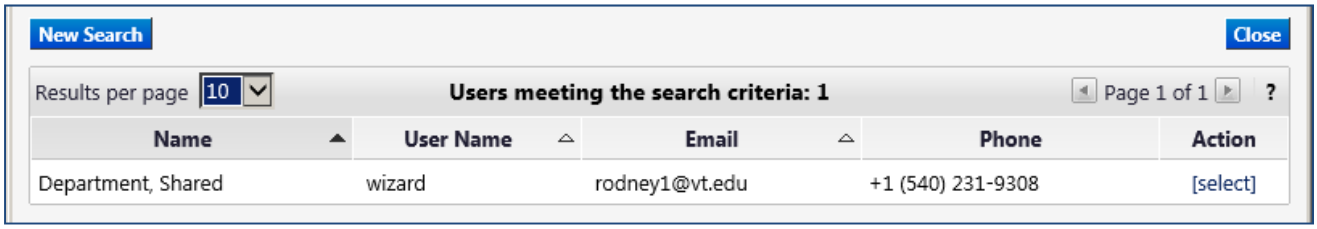
- Click "edit."
- The expanded "General" box will open.
- In the "Prepared for" field, click "Select a different user."

- A User Search box will open**.**



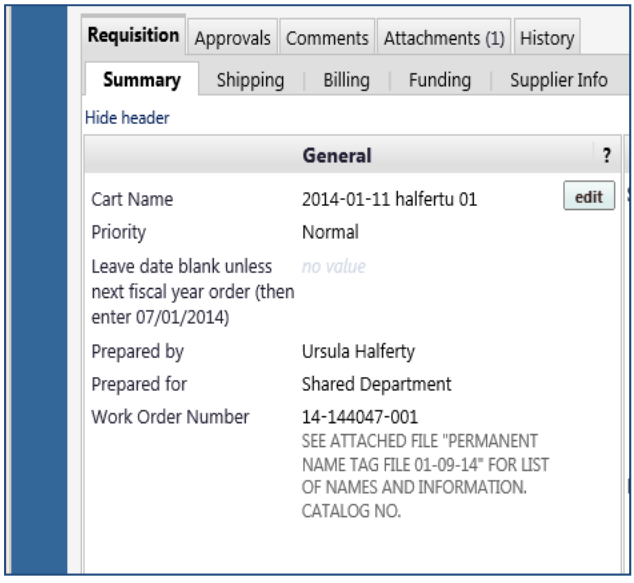
- Type in "Shared Department**."**
  - type **"Department"** in the Last name field
  - Type **"Shared"** in the First name field
- Click **"**Search."

- A search results box will open**.**



- Click select "Department, Shared**"**

"Shared Department**"** will now appear in the "Prepared for" line.



- Complete the PR as usual.

Follow the instructions for Requisition and Purchase Order Follow-up.

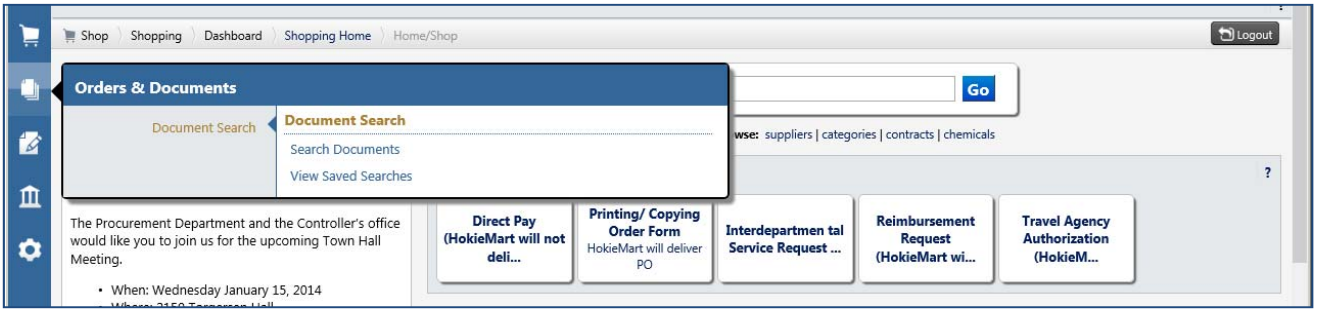
The PR will be routed to all approvers for review and will require an approval from each department that provided funding.

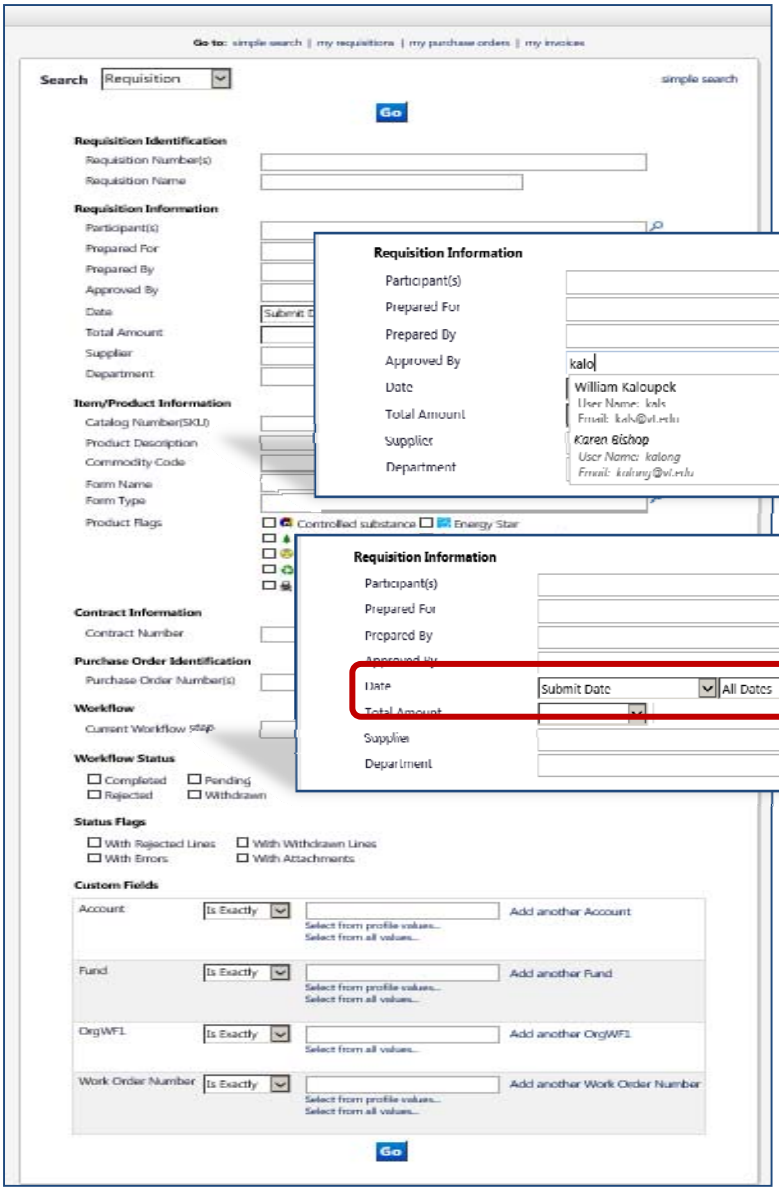
Follow the instructions "Searching for 'Shared Departments'" to view the PR/PO for "Shared Department."

Search by Approver

As the need arises the requestor can perform a history search which will provide a list of the Purchase Requisitions (PRs) approved by individual **Approvers**. Navigate to the document search feature.

- Click on Search Documents to bring up the search screen



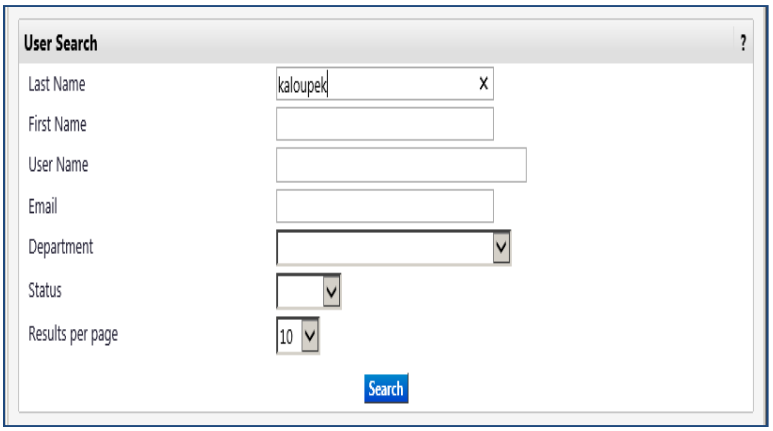


- If searching for one Approver, simply type the name in directly in the **"Approved By"** field box

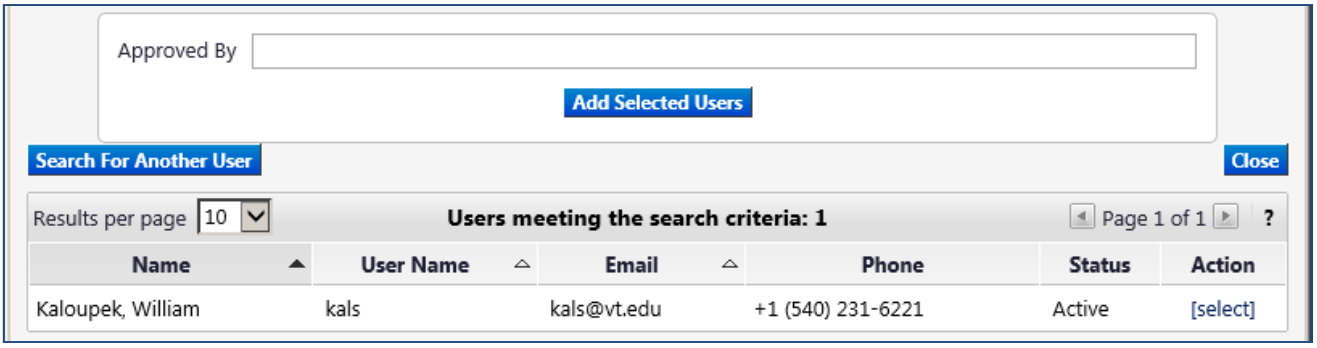
- For an advanced approver search click on the search icon next to the "Approved by" line to open User Search Box.

This feature allows the user to search for multiple Approvers in a single search

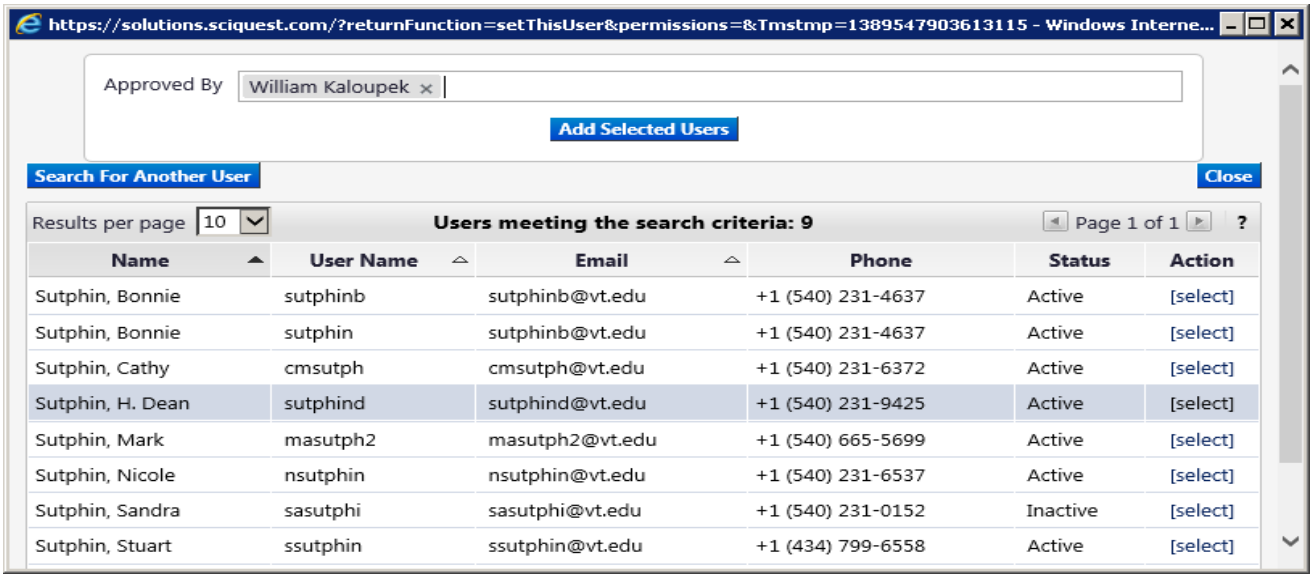
- Enter the last name of the first Approver.
- Click “Search”

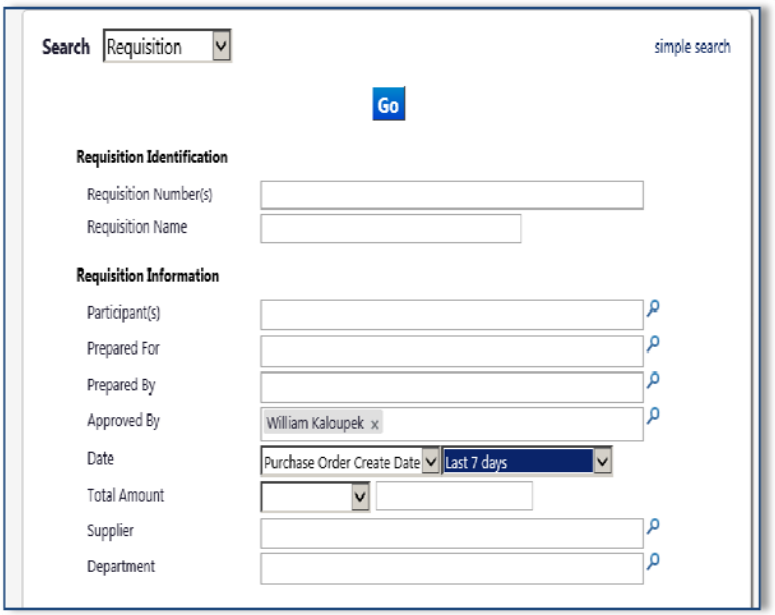


- Click “select” and then click “Add Selected Users”



- This will add the Approver to the search field. Continue adding Approvers as needed.
- When finished click close to return to the main Document Search screen.

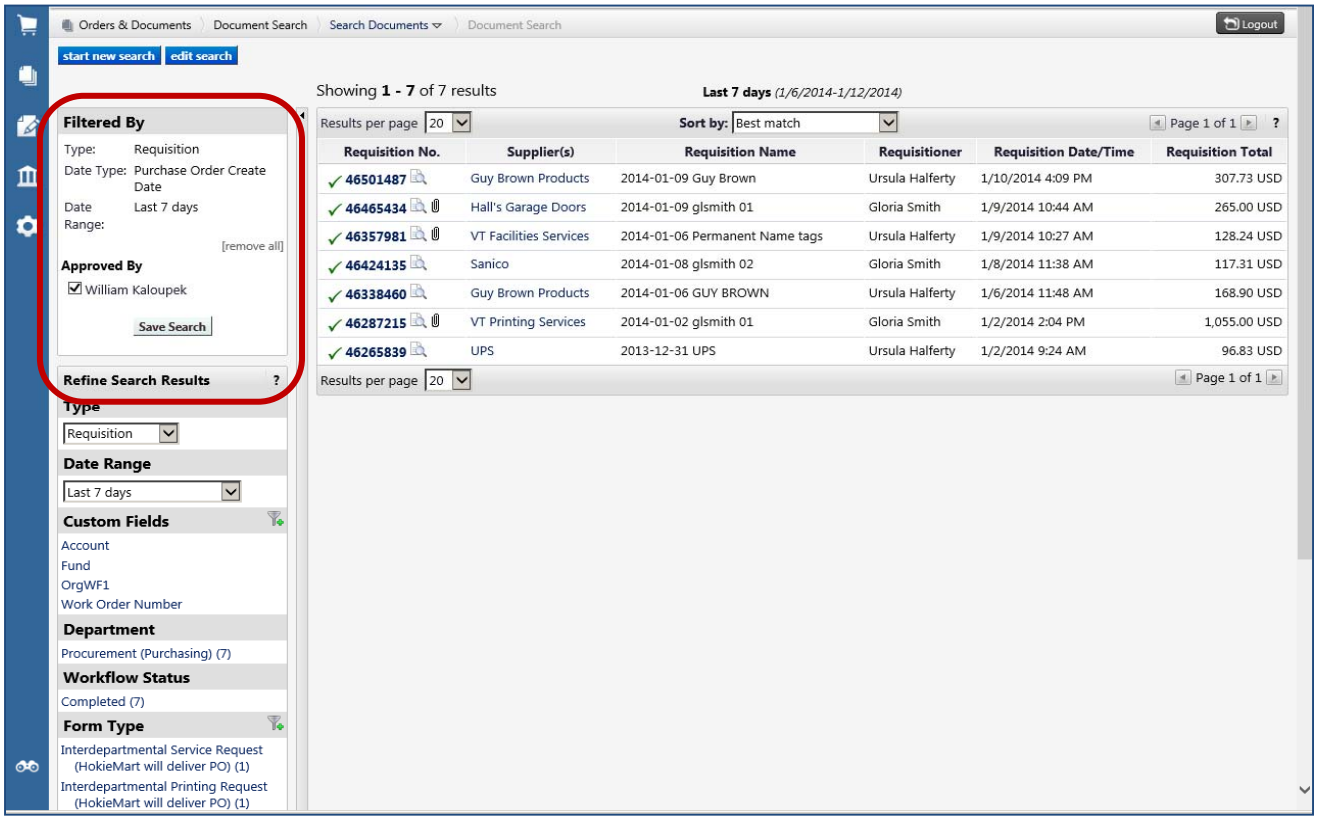




In this sample single "Approved By" search

- Select "Start Date" and "End Date" for the range of the search.
- Select "Department" or any other search options available that will assist the user and narrow the search.
- Click on "Go".

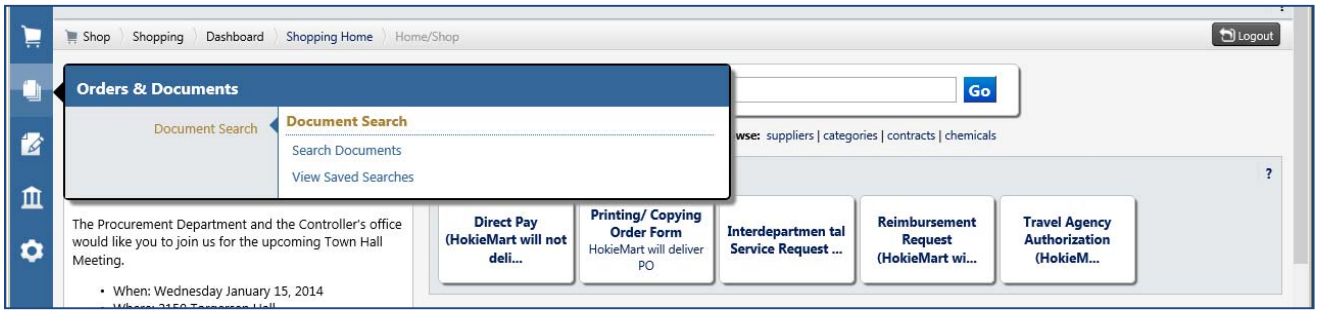
This is an example of a completed search form. All PRs will be listed for the chosen Approver in the chosen date range. In the left side panel the user can see the search options selected for this search.


Orders & Documents
Document Search
Search Documents
Document Search
Logout
start new search
edit search
Showing 1 - 7 of 7 results
Last 7 days (1/6/2014-1/12/2014)
Filtered By
Type: Requisition
Date Type: Purchase Order Create Date
Date Range: Last 7 days
[remove all]
Approved By
William Kaloupek
Save Search
Refine Search Results
Type
Requisition
Date Range
Last 7 days
Custom Fields
Account
Fund
OrgWF1
Work Order Number
Department
Procurement (Purchasing) (7)
Workflow Status
Completed (7)
Form Type
Interdepartmental Service Request (HokieMart will deliver PO) (1)
Interdepartmental Printing Request (HokieMart will deliver PO) (1)
Results per page 20
Sort by: Best match
Page 1 of 1
Requisition No.
Supplier(s)
Requisition Name
Requisitioner
Requisition Date/Time
Requisition Total
46501487 Guy Brown Products 2014-01-09 Guy Brown Ursula Halferty 1/10/2014 4:09 PM 307.73 USD
46465434 Hall's Garage Doors 2014-01-09 glsmith 01 Gloria Smith 1/9/2014 10:44 AM 265.00 USD
46357981 VT Facilities Services 2014-01-06 Permanent Name tags Ursula Halferty 1/9/2014 10:27 AM 128.24 USD
46424135 Sanico 2014-01-08 glsmith 02 Gloria Smith 1/8/2014 11:38 AM 117.31 USD
46338460 Guy Brown Products 2014-01-06 GUY BROWN Ursula Halferty 1/6/2014 11:48 AM 168.90 USD
46287215 VT Printing Services 2014-01-02 glsmith 01 Gloria Smith 1/2/2014 2:04 PM 1,055.00 USD
46265839 UPS 2013-12-31 UPS Ursula Halferty 1/2/2014 9:24 AM 96.83 USD
Results per page 20
Page 1 of 1

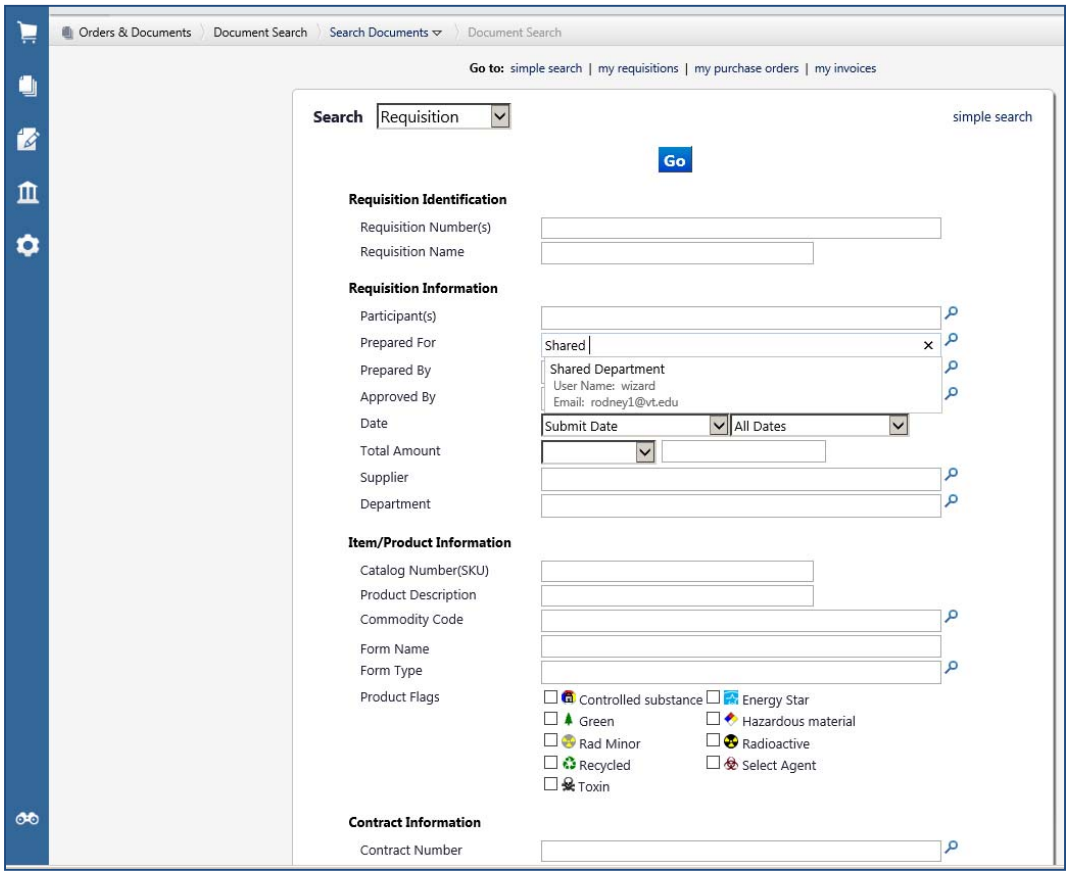
Searching for Shared Departments

As the need arises the user can perform a search which will provide a list of the Purchase Requisitions (PRs created for Shared Departments. Navigate to the document search feature.

- Click on Search Documents to bring up the search screen

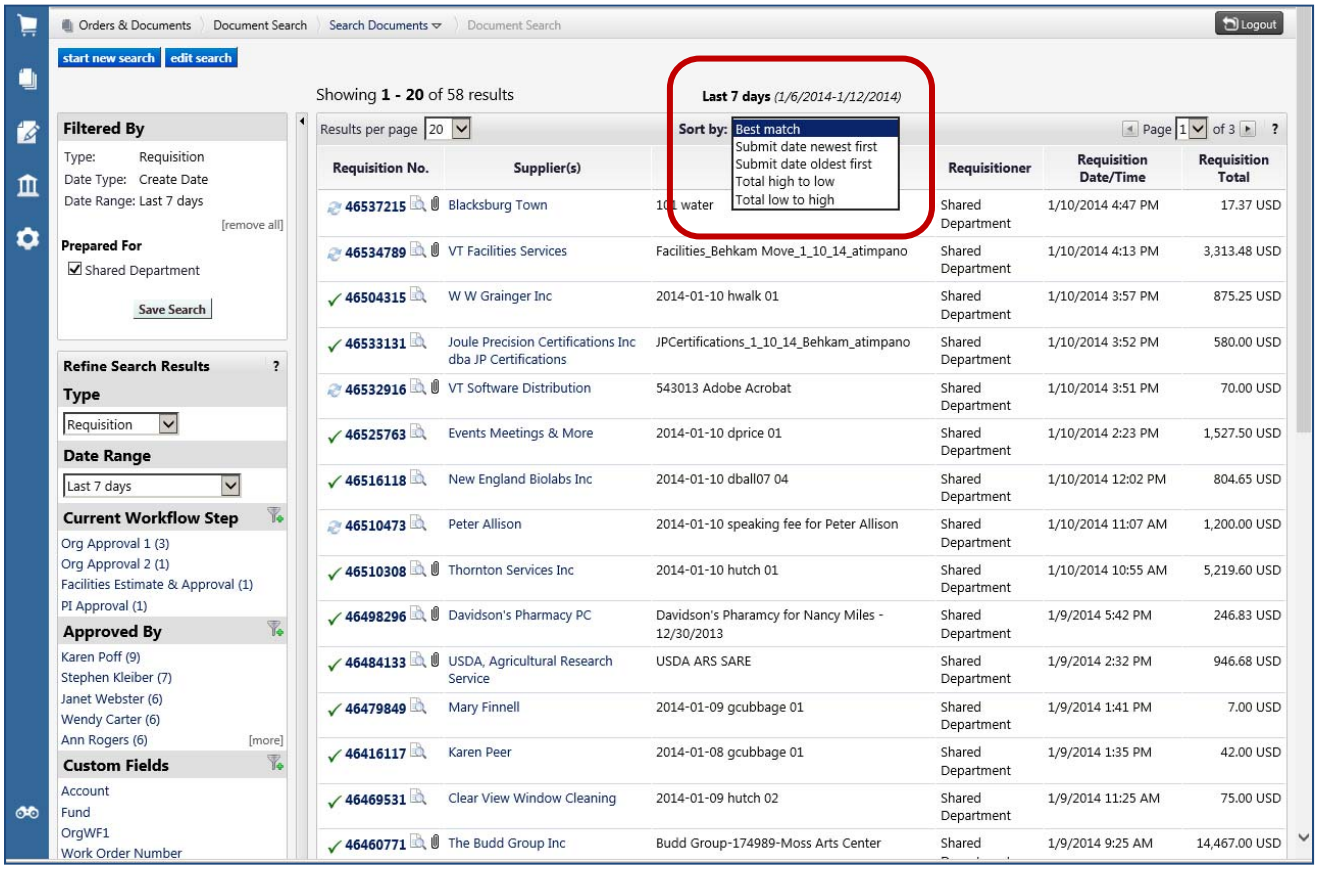


- Type Shared Department in the Prepared For field



All Shared Department PO's for selected search criteria should appear.

- One additional sort option is available. The user can select and sort by: Best match, Submit date newest first, Submit date oldest first, Total high to low, or Total low to high.

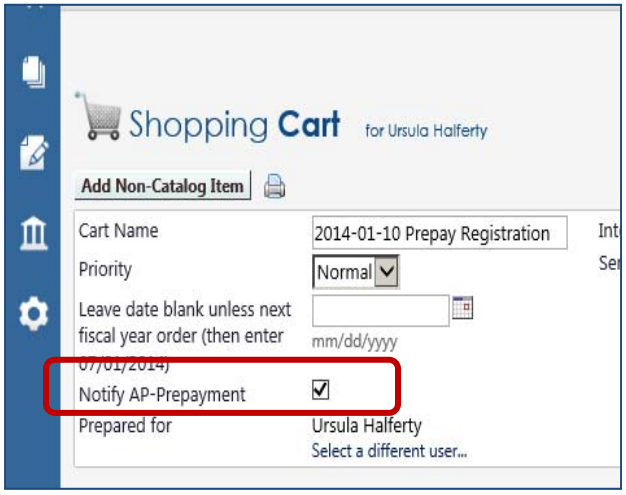

Orders & Documents
Document Search
Search Documents
Document Search
Logout
start new search
edit search
Showing 1 - 20 of 58 results
Last 7 days (1/6/2014-1/12/2014)
Filtered By
Type: Requisition
Date Type: Create Date
Date Range: Last 7 days
[remove all]
Prepared For
Shared Department
Save Search
Refine Search Results
Type
Requisition
Date Range
Last 7 days
Current Workflow Step
Org Approval 1 (3)
Org Approval 2 (1)
Facilities Estimate & Approval (1)
PI Approval (1)
Approved By
Karen Poff (9)
Stephen Kleiber (7)
Janet Webster (6)
Wendy Carter (6)
Ann Rogers (6) [more]
Custom Fields
Account
Fund
OrgWF1
Work Order Number
Results per page 20
Sort by: Best match
Submit date newest first
Submit date oldest first
Total high to low
Total low to high
Page 1 of 3
Requisition No.
Supplier(s)
Requisitioner
Requisition Date/Time
Requisition Total
46537215 Blacksburg Town 101 water Shared Department 1/10/2014 4:47 PM 17.37 USD
46534789 VT Facilities Services Facilities_Behkam Move_1_10_14_atimpano Shared Department 1/10/2014 4:13 PM 3,313.48 USD
46504315 W W Grainger Inc 2014-01-10 hwalk 01 Shared Department 1/10/2014 3:57 PM 875.25 USD
46533131 Joule Precision Certifications Inc dba JP Certifications JPCertifications_1_10_14_Behkam_atimpano Shared Department 1/10/2014 3:52 PM 580.00 USD
46532916 VT Software Distribution 543013 Adobe Acrobat Shared Department 1/10/2014 3:51 PM 70.00 USD
46525763 Events Meetings & More 2014-01-10 dprice 01 Shared Department 1/10/2014 2:23 PM 1,527.50 USD
46516118 New England Biolabs Inc 2014-01-10 dball07 04 Shared Department 1/10/2014 12:02 PM 804.65 USD
46510473 Peter Allison 2014-01-10 speaking fee for Peter Allison Shared Department 1/10/2014 11:07 AM 1,200.00 USD
46510308 Thornton Services Inc 2014-01-10 hutch 01 Shared Department 1/10/2014 10:55 AM 5,219.60 USD
46498296 Davidson's Pharmacy PC Davidson's Pharamcy for Nancy Miles - 12/30/2013 Shared Department 1/9/2014 5:42 PM 246.83 USD
46484133 USDA, Agricultural Research Service USDA ARS SARE Shared Department 1/9/2014 2:32 PM 946.68 USD
46479849 Mary Finnell 2014-01-09 gcubbage 01 Shared Department 1/9/2014 1:41 PM 7.00 USD
46416117 Karen Peer 2014-01-08 gcubbage 01 Shared Department 1/9/2014 1:35 PM 42.00 USD
46469531 Clear View Window Cleaning 2014-01-09 hutch 02 Shared Department 1/9/2014 11:25 AM 75.00 USD
46460771 The Budd Group Inc Budd Group-174989-Moss Arts Center Shared 1/9/2014 9:25 AM 14,467.00 USD

Prepayment Notification

Prepayment Notification is a feature that alerts the accounts payable department that a check must be cut and sent on to a vendor/ supplier, prior to receipt of goods and/or services. Although it is not the policy of the university to prepay for goods and/or service, there are times a vendor/ supplier must be paid in advance, such as magazine subscription, conference registration or a partial deposit payment.

If the user has any questions related to a prepayment contact **hokiemart@vt.edu**. The Procurement Department will direct your question to appropriate area.

When orders are processed in HokieMart, the system moves the PO accordingly. By selecting "Notify AP-Prepayment", the system will route the PO to accounts payable.



From the Main Screen of HokieMart:

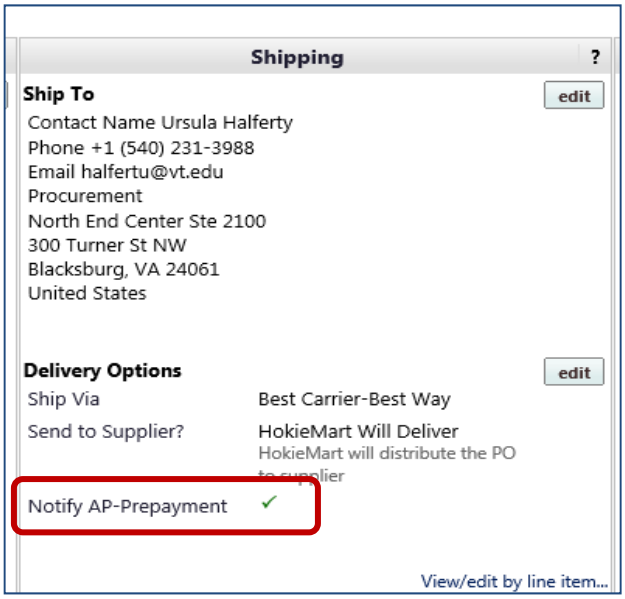
- Select the desired form.
- Enter desired supplier.
- Choose supplier from drop-down menu.
- Complete the "General Info" section of the form.
- When complete click 'Add to Cart and Return" or "Add and go to Cart."
- User will now be in "Cart Draft Requisition."

For **PREPAYMENT ONLY:**

- Place a checkmark in the "Notify AP-Prepayment" box.
- Click on Proceed to Checkout.

When in Draft Requisition the user will notice that in the Delivery Option section the "Notify AP Prepayment" has a green checkmark ✓.

- Scan supporting documentation (invoice, registration form, etc.) and electronically attach to the PO as an Internal attachment.
- Complete the PR.
- Follow the instructions for Requisition and Purchase Order Follow-up.



Processes – Forms

There are 9 purchasing processes in HokieMart: Hosted Catalogs (contract suppliers), Hosted Catalogs (non-contract suppliers), Punchouts (contract suppliers), Non-Catalog (non-contract suppliers), Reimbursement Request, Direct Pay, Travel Agency Authorization (contract suppliers), Interdepartmental Printing Request, and Interdepartmental Service Request.

Form/Process	Process Description	Limits	Additional Notes
Hosted Catalog – Contract Suppliers Primarily scientific suppliers with list prices.	The HokieMart system allows the user to perform searches in various ways (product name, SKU, vendor name, etc.) under the product search tab against the vendor catalog. The supplier's catalog is loaded into the HokieMart system and updated quarterly for price and product changes. All contract suppliers are indicated in HokieMart with the following symbol The symbol is found under "browse by supplier" (beside the vendor name).	Unlimited departmental purchasing authority	
Hosted Catalog – Non-Contract Suppliers Non-contract supplier, primarily scientific suppliers with list prices	The HokieMart system allows the user to perform searches in various ways (product name, SKU, vendor name, etc.) under the product search tab against the vendor catalog. The supplier's catalog is loaded into the HokieMart system and updated quarterly for price and product changes.	Departmental delegation of $2,000 or less	When items from these catalogs exceed $2,000, the Purchase Requisition will be created and sent to the Procurement Department for competitive procurement.

Form/Process	Process Description	Limits	Additional Notes
Punchouts - Contract Suppliers Airgas Apple Computer Applied Biosystems CDW-G Daly Computer Dell Marketing ECK Ferguson Fisher Scientific Fujitsu Grainger Guy Brown IDT Invitrogen MSC Qiagen Sigma Aldrich State Electric Supply Room TIG Virginia Correctional Enterprises VWR	The HokieMart system allows the user to "punch out" to the supplier's website, select products, and build a cart. Additional suppliers are added as they become official Punchouts.	Unlimited departmental purchasing authority EXCEPT for computer suppliers Daly, Dell and Apple (cap of $20,000 delegated authority)	
Non-Catalog Item Form	Purchase(s) that cannot be handled through the hosted catalogs, Punchouts, Direct Pay, Reimbursement Request. (Example is New River Office Supply.)	Departmental delegation of $2,000 or less	Purchase(s) or payment(s) to suppliers who are not Punchouts or Direct Pay. When the order exceeds $2,000, it will be sent electronically to the Procurement Department for competitive procurement.

Form/Process	Process Description	Limits	Additional Notes
Reimbursement Request Form	Reimburse Virginia Tech students/employees for non-travel items/services up to $2,000. Entertainment and recruitment expenses in Blacksburg area or other official station may also be processed on this form.	Departmental delegation of $2,000 or less	Send supporting original receipts to the Controller's Office with reference to the PO number. Reimbursee must sign statement on HokieMart form (either print HokieMart form or stamp document with statement located in the Internal Info Instruction).
Direct Pay Form	Items (goods and services) obtained under the direct payment procedures. (See Requestor Guide for the Direct Pay Policy and a listing of the categories or use the URL provided in next column.)	See the Direct Pay delegated items at the following website: **http://www.procurement.vt.edu/Department/Procedures/do_list.pdf**	Select the appropriate payment category from the drop-down menu. Send original vendor invoice to the Controller's Office. Write the PO No in the upper, right-hand corner of the vendor invoice. **Direct Payments may be processed using the prepayment procedure. See instructions in the Requestor Guide.
Travel Agency Authorization (TAA) Form	Purchase airline tickets and other travel-related services from contract travel agencies listed on the drop-down menu of the TAA.	Unlimited departmental purchasing authority	Provide additional instructions to travel agency under the "external info" section (such as rental car, personal travel, etc.). Enter the traveler's name in the catalog no. field. Include ticket information such as dates, to and from locations, etc. in the "product name/description" field or attach a copy of the airline schedule as an external attachment.

Form/Process	Process Description	Limits	Additional Notes
Interdepartmental Printing Request (IPR)	Order printing services from university printing facilities: Copy Center I (Burruss Hall), Copy Center II (Smyth Hall), and Printing Services (South Main Street).	Unlimited departmental purchasing authority.	Complete the IPR work request template and attach it to the HokieMart IPR as an External Attachment.
Interdepartmental Service Request (ISR)	Use this form to order services from on-campus suppliers listed on the drop-down menu of the ISR form.	Unlimited departmental purchasing authority	Attach other documents as needed. Complete the ISR form.

Processes – Procurement and Accounts Payable

Process 1: Miscellaneous Procurement Processes

Department Process	Procurement Department	Accounts Payable
Ship to Addresses Department should select a shipping address from the list of current shipping addresses in the HokieMart. If the address cannot be found, complete the "Ship To/Invoice To Address Request Form" located on the Procurement Department website: **www.procurement.vt.edu/**Department/forms.html and e-mail the form to hmshipto@vt.edu	Will add/update shipping information if it does not currently exist and notify the department when it has been processed so that the PR can be completed.	
Changing Information on PRs Sent to Procurement for Processing (before a PO is created) Department must send an email to the Procurement Department buyer assigned the PR if they want to change a quantity/fund/description on a PR over $2,000.	The Procurement Department will reflect this change on the PO when it is created.	

Department Process	Procurement Department	Accounts Payable
Sole Source Justifications If a PR is processed for a sole source supplier, the department must complete the "Sole Source Proprietary Procurement Request" form located on the Procurement Department website: **www.procurement.vt.edu/Department forms.html** and attach it to the PR when it is processed in the HokieMart.	The Procurement Department will evaluate the sole source justification and process the PR.	
PRs for Establishment of Term Contracts If the PR is for a term contract, the department will select "Best Vendor" as the supplier. This will generate a PR which will be created in Banner. The dollar amount on these PRs may be $0.00	The Procurement Department will use this PR as authorization to proceed with the contract process. The PR is usually cancelled at the end of the contracting process.	
Next Fiscal Year Purchases **If the PR should be processed out of next fiscal** year's funds, enter the date in "Accounting Date" in the upper right-hand corner of the cart. If ANY payment is projected to be paid in the current fiscal year, the order cannot be entered into the next fiscal year.	The PO will be processed against the next fiscal year.	POs created in the next fiscal year cannot be paid in the current fiscal year.
Shipping Charges The department should add a line item on the Non-Catalog Item for "estimated shipping" when shipping charges are to be paid by the department.		If the department does not include a separate line item on the PR and the invoice includes a shipping charge, the shipping charge will be added to one of the line items.

Process 2: Change Orders for HokieMart POs

Purchase Order Changes against purchase orders created in the HokieMart by a department should follow the process described below

Department Process	Procurement Department	Accounts Payable
Department additions to a PO item created by department may be shown on the receiving report.		
Department requests a change in the funding. The funding change can be made when the invoice is paid. If the department has the invoice in hand, write the new fund number at the top right-hand corner of the invoice beside the PO number. If the invoice is mailed directly to the Controller's Office by the vendor, the funding change must be made by the department by journal entry. Additional lines of funding cannot be added to a PO which has only one funding line.		
The department receives the goods or services. The departmental Receiver goes into HokieMart and completes the electronic receiving report.		

Process 3: Accounts Payable Payment Process

Department Process	Procurement Department	Accounts Payable
If department receives supplier invoice directly from supplier, date stamp invoice, write PO number on invoice, and forward to Controller's Office.		Suppliers mail invoices directly to the Controller's Office. Invoices are date stamped when received from the departments.
Department completes receiving report in HokieMart if applicable.		
		The PO number is obtained from the supplier invoice. The invoice is entered in Banner referencing the PO number and line items.
		If the invoice line item exceeds the PO line item amount by 10% or $100, the department is contacted to resolve the difference before the invoice is entered in Banner.

Department Process (continued)	Procurement Department	Accounts Payable
		If the dollar amount difference is a result of shipping, freight, or handling costs and the PO is within the delegated authority, of the department, the expense can be paid if it is not more than $100 or 10% of the total expense (whichever is more). The department must indicate if they asked the supplier to expedite the order. This should be noted in the internal or external notes on the purchase request form. These charges are paid regardless of delegated authority.
Department receives more items than ordered and decides to keep additional shipment by completing the receiving report for all items received and does not indicate that any items were returned. A note should added in the Receiving Notes that indicates that department wants to keep and pay for additional items received over order quantity or, department indicates on receiving report that items received in excess of order quantity are returned.		If the difference is a result of a discrepancy between the quantity ordered and shipped, the invoice will be paid (exceeds cost of PO) if department received all items on the receiving report and did not return any items (and the amount is **less than $2,000**). If the receiving report indicates that items were returned because more were shipped than ordered, then an amount less than invoiced will be paid.

Department Process (continued)	Procurement Department	Accounts Payable
Department discusses unit price discrepancy with supplier and instructs Controller's Office to pay or not to pay additional cost.		If the unit cost on the invoice for goods or services ordered is more than indicated on the PO (by 10% or $100), the Accounts Payable staff will communicate with the department to resolve the discrepancy. The Accounts Payable staff can only pay additional cost upon direction by the department (if the amount is within the delegated departmental authority).
		If the invoice includes an additional line item that was not included on the departmental PO, the department must complete an additional PO in the HokieMart if the total order is within the departmental delegated authority. The invoice will be paid against the two POs.
	Issues a change order. Change order is only reflected in Banner.	Discrepancies may exist between the PO and invoice where the departmental delegated authority is exceeded (i.e. Procurement Department issued the PO from a departmental PR). In this situation, the additional cost cannot be paid unless the Procurement Department issues a PO change (this includes additional shipping costs).

Department Process (continued)	Procurement Department	Accounts Payable
	Issues a change order. Change order is only reflected in Banner.	Discrepancies may exist between the PO and invoice where the departmental delegated authority is exceeded (i.e. Procurement Department issued the PO from a departmental PR). In this situation, the additional cost cannot be paid unless the Procurement Department issues a PO change (this includes additional shipping costs).
		The Banner matching process is run daily to match invoices recorded in Banner to receiving reports. Invoices that match are posted to the Banner funds and the invoice waits for the due date for the disbursement to be made to the supplier. Invoices that do not match are reported on exception reports for Accounts Payable employees to research.
If discrepancies exist between the invoice and the receiving report, the department investigates and resolves the issue so that Accounts Payable can process the invoice.		If an item(s) have not been received, the department is contacted to complete the receiving report in HokieMart.

Process 4: Prepayments in HokieMart

Department Process	Procurement Department	Accounts Payable
Department should enter the prepayment in HokieMart. The Requestor should check the box in the cart titled, "Notify AP-Prepayment." All required documentation for the prepayment should be attached to the HokieMart form in an Internal Note. Do not send paper copies for prepayments. A receiving action is not required for prepayments. This procedure is for prepayment only. All other invoices should be mailed to the Controller's Office.		Controller's Office will monitor the HokieMart notification folder throughout the day and will process prepayments as the emails are received.

Process 5: Guidance for Reconciling HokieMart Transactions in Banner

The Controller's Office in coordination with Internal Audit has revised "Procedure 10305a: Review of Financial Activities" to provide guidance for reviewing Banner Finance transactions in relation to the HokieMart. Please see the revised procedure at **http://www.co.vt.edu/procedures/p10305a.html**.

Please direct questions to Annie Conley (anniec@vt.edu**)** or Penny Falck (plfalck@vt.edu).

Miscellaneous Information

Account Codes for Administrative Approval

Use these account codes to route purchases that require approvals by Printing Services, Communications Network Services (CNS) and Environmental Health and Safety Services (EHSS). If these codes are not used, the purchasing process time will increase.

Contractual Services

12156 Printing Services – Private Vendors (Printing Approval) – Include expenses for designing, printing, collating, and binding services received from a private vendor.

Supplies, Materials, & Equipment Costing Less Than $2,000 Per Item

1341A Respirators (EHSS Approval)

13415 Radioactive Supplies (EHSS Approval) – Include expenses for radioactive supplies costing less than $2,000 per unit.

22316 Electronic Equipment (CNS Approval) – Include expenses for two-way radios costing less than $2,000 per unit.

22336 Voice and Data Transmission Equipment (CNS Approval) - Include expenses for telephone equipment costing less than $2,000 per unit.

22412 Lasers (EHSS Approval) – Class 3R, 3B, 4 costing less than $2,000 per unit.

22416 Laboratory Equipment (EHSS Approval) – Include expenses for refrigerators, freezers, fume hoods, biological safety cabinets, radiation survey instruments costing less than $2,000 per unit.

22419 X-Ray Equipment (EHSS Approval) - Include expenses for x-ray equipment (e.g., diffraction (XRD), fluorescence (XRF), electron microscopes, microCT, ESCA, XPS) costing less than $2000 per unit.

22426 Medical and Dental Equipment (EHSS Approval) – Include expenses for medical, dental and veterinary x-ray equipment (e.g., c-arms, portables, fluoroscopy, CT, bone densitometer) costing less than $2,000 per unit.

22536 Construction Equipment (EHSS Approval) – Include expenses for scaffolding costing less than $2,000 per unit.

22546 Motor Vehicle Equipment (EHSS Approval) – Include expenses for forklifts, powered pallet jacks, pallet trucks, and rider fork trucks costing less than $2,000 per unit.

22736 Manufacturing Equipment (EHSS Approval) – Include expenses for aerial lifts and mechanical power presses costing less than $2,000 per unit.

Capitalized Equipment Costing More Than $2,000 Per Unit

22311 Electronic Equipment (CNS Approval) – Include expenses for two-way radio costing $2,000 or more per unit.

22331 Voice and Data Transmission Equipment (CNS Approval) – Include expenses for telephone equipment costing $2,000 or more per unit.

22411 Laboratory Equipment (EHSS Approval) – Include expenses for refrigerators, freezers, fume hoods, biological safety cabinets, radiation survey instruments costing $2,000 or more per unit.

22414 X-Ray Equipment (EHSS Approval) - Include expenses for x-ray equipment (e.g., diffraction (XRD), fluorescence (XRF), electron microscopes, microCT, ESCA, XPS) costing $2000 or more per unit.

22417 Lasers (EHSS Approval) – Class 3R, 3B, 4 costing $2,000 or more per unit.

22421 - Medical and Dental Equipment (EHSS Approval) – Include expenses for medical, dental and veterinary x-ray equipment (e.g., c-arms, portables, fluoroscopy, CT, bone densitometer) costing $2,000 or more per unit.

22531 Construction Equipment (EHSS Approval) – Include expenses for scaffolding costing $2,000 or more per unit.

22541 Motor Vehicle Equipment (EHSS Approval) – Include expenses for forklifts, powered pallet jacks, pallet trucks, and rider fork trucks costing $2,000 or more per unit.

22731 Manufacturing Equipment (EHSS Approval) – Include expenses for aerial lifts and mechanical power presses costing $2,000 or more per unit.

www.procurement.vt.edu/HokieMart/hm.html
Revised 12.12.13

Copier Maintenance/Rental Payments

Copier Maintenance/Rental Payments – Process as a contract purchase by SELECTING THE CONTRACT on the Non-Catalog Item form when the warning message is displayed (see Quick Guide for Non-Catalog Items).

Copier Purchase and First-Year Maintenance Agreements

New Copier Purchases/Initial First Year Maintenance Agreements process on a Non-Catalog Item form WITHOUT SELECTING THE CONTRACT. The Procurement Department will continue to process a university PO for copier rental. The Procurement Department will continue to process a PO for the new copier and the initial (first year) maintenance agreement. All subsequent maintenance/rental payments will be processed by SELECTING THE CONTRACT.

For more detailed instructions related to copiers visit the Procurement web-site and locate the link for copiers on the Departmental Procurement Procedures and Guidelines web-page:

http://www.procurement.vt.edu/Department/ProcDirectory.html

Credit Memos in HokieMart

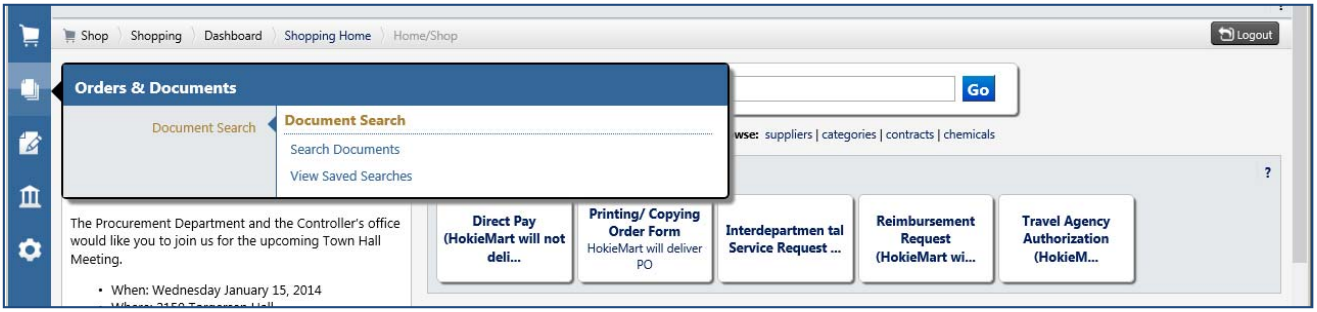
Credit memos cannot be processed in HokieMart. Please send the hard copy/paper credit memo to the Controller's Office (MC 0312) with the applicable PO number written in the upper, right-hand corner. The Controller's office will process the credit memo and close out the invoice.

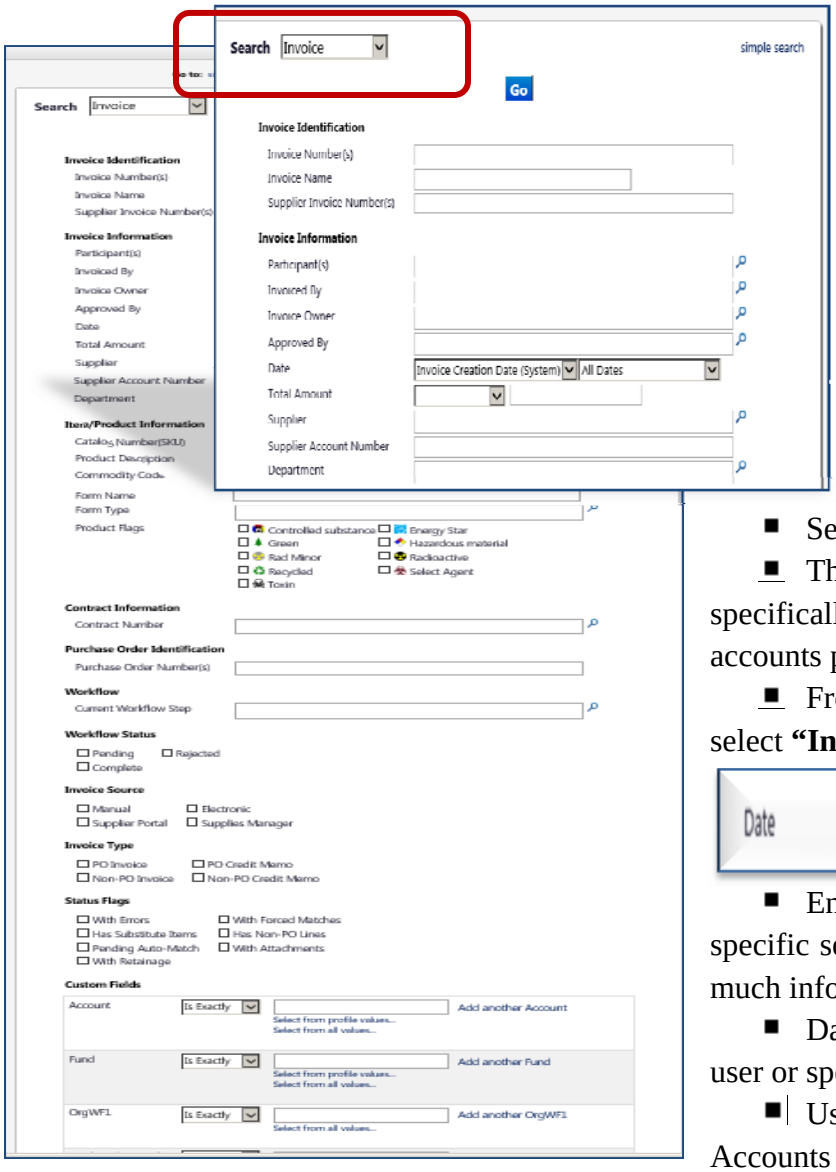
eInvoicing

There are several suppliers who electronically invoice (einvoice) the university *(for a complete list see* http://www.procurement.vt.edu/HokieMart/hm.html). Other supplies will be added as their eInvoicing capability is complete. There are two options to view electronic invoices in HokieMart.

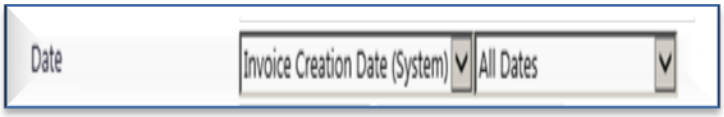
Option #1

When the PO number is not known or user wishes to view multiple eInvoices navigate to the Search Document screen:





- Select Search by "Invoice" option.
- The search fields in this screen are specifically related to system created invoices and accounts payable attributes.
- From the drop down menu next to Date select **"Invoice Creation Date (System)"**.



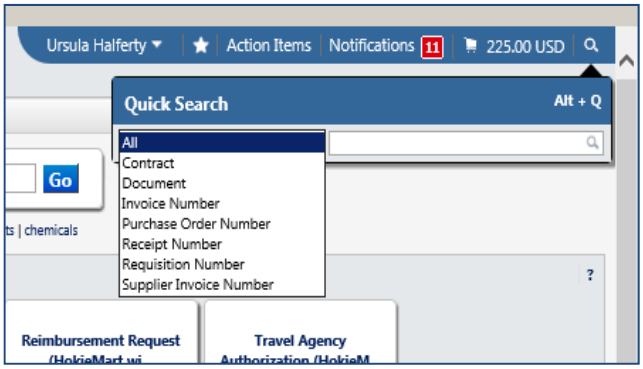
- Enter desired information to perform specific search. Users may identify as little or as much information as necessary to return results.
- Date range may be identified, a specific user or specific approver.
- Users may also search by particular Accounts or Funds.

- Click "Go."

User can now view the electronic invoice.

Option #2

When the either the PO or invoice number is known the user can use the **Quick Search** (Alt +Q) feature located on the right side of the top menu bar .



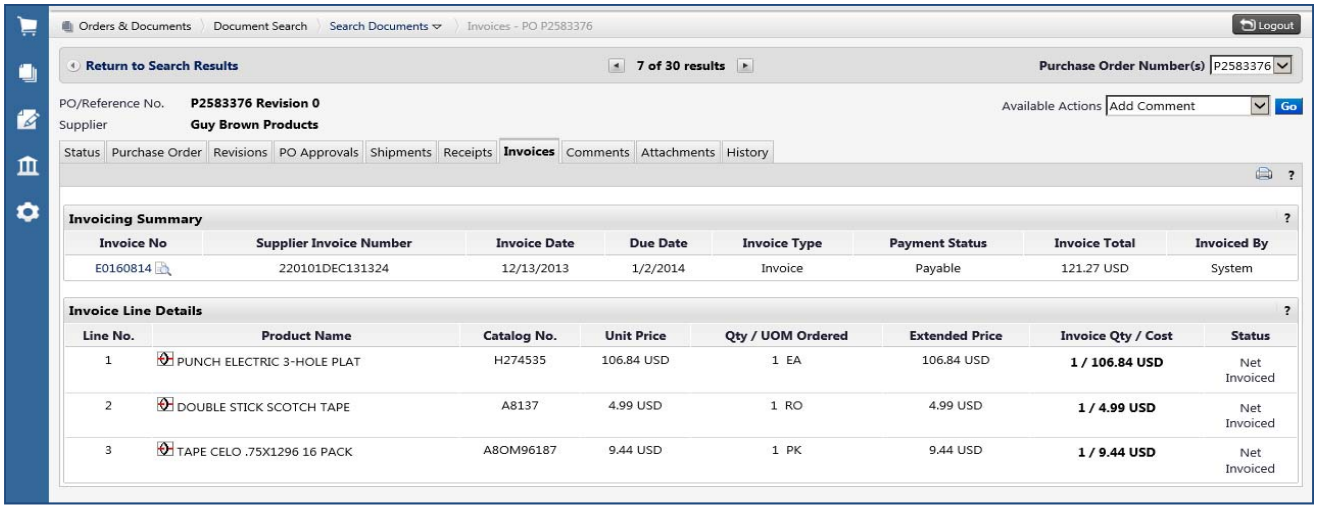
If the Invoice Number Option is selected the e-Invoice will be displayed.

If the **Purchase Order Number** option was selected, the PO will be displayed then.

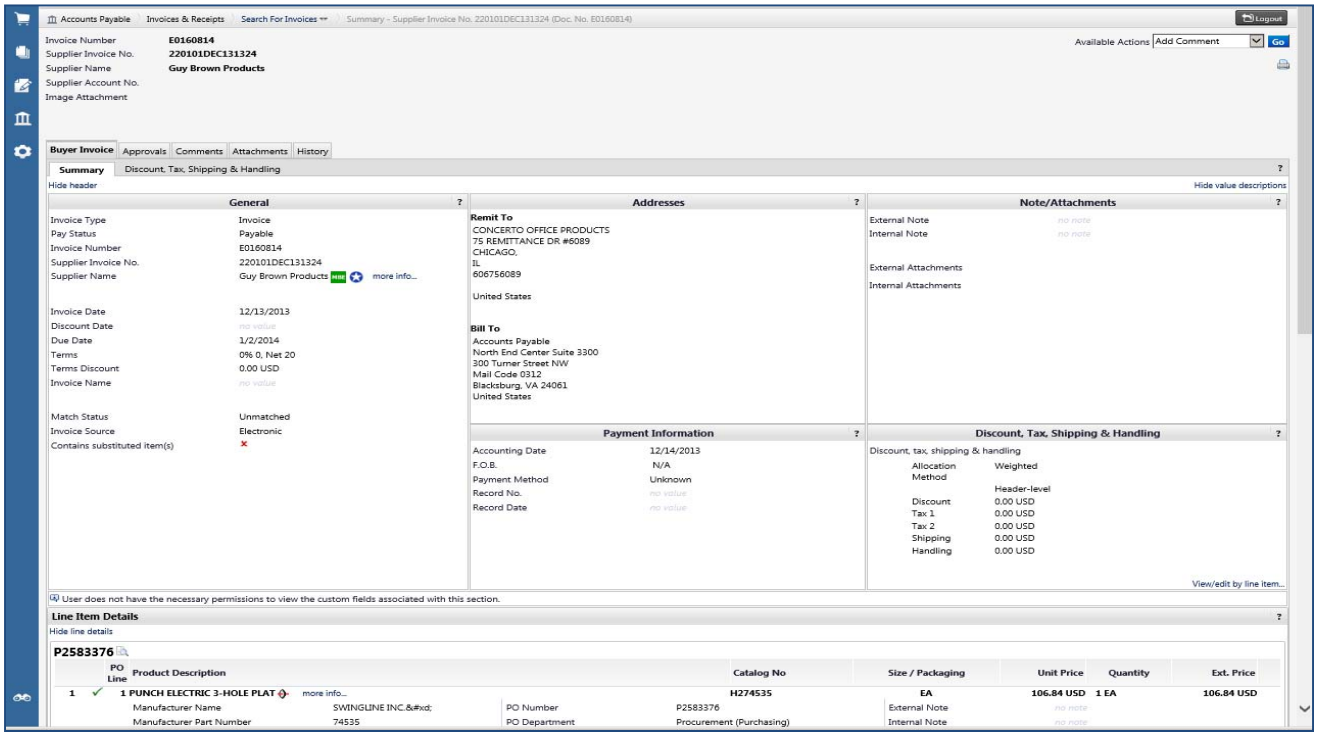
- Click “Invoices” tab.”

The eInvoice number is now visible.

- Click on the invoice number that is preceded by an “E”.


Orders & Documents
Document Search
Search Documents
Invoices - PO P2583376
Logout
Return to Search Results
7 of 30 results
Purchase Order Number(s) P2583376
PO/Reference No. P2583376 Revision 0
Supplier Guy Brown Products
Available Actions Add Comment Go
Status Purchase Order Revisions PO Approvals Shipments Receipts Invoices Comments Attachments History
Invoicing Summary
Invoice No | Supplier Invoice Number | Invoice Date | Due Date | Invoice Type | Payment Status | Invoice Total | Invoiced By
E0160814 | 220101DEC131324 | 12/13/2013 | 1/2/2014 | Invoice | Payable | 121.27 USD | System
Invoice Line Details
Line No. | Product Name | Catalog No. | Unit Price | Qty / UOM Ordered | Extended Price | Invoice Qty / Cost | Status
1 | PUNCH ELECTRIC 3-HOLE PLAT | H274535 | 106.84 USD | 1 EA | 106.84 USD | 1 / 106.84 USD | Net Invoiced
2 | DOUBLE STICK SCOTCH TAPE | A8137 | 4.99 USD | 1 RO | 4.99 USD | 1 / 4.99 USD | Net Invoiced
3 | TAPE CELO .75X1296 16 PACK | A8OM96187 | 9.44 USD | 1 PK | 9.44 USD | 1 / 9.44 USD | Net Invoiced

The entire eInvoice will be visible.



Invoice Imaging

Accounts Payable invoices and travel vouchers can be viewed directly from Banner. Please see the web link below for information on how to access Accounts Payable invoice images:

http://www.co.vt.edu/Procedures/p21005a.pdf.

Please note that images are available for accounts payable invoices from July 1, 2007 forward. **This does not include e-invoices.**

Travel documents are available from May 1, 2010 forward. Department users can only view documents that have funding on their organization code.

Please direct any questions related to viewing images to **Accounts Payable at 231-6418**. If you need any technical assistance please contact 4-HELP.

Error Messages in HokieMart

Error Message	Definition of Message	Action to Correct
Note: Exception creating the Purchase Order object. Error: ORA-20100: Accounting Record Errors for sequence 1, *ERROR* Transaction date 28-JUL-2008 is not in an open accounting period for chart U	Accounting date field was used	Copy the cart, remove the accounting date, and re-submit the PR
Note: Exception creating the Purchase Order object. Error: ORA-20100: Insufficient budget for item 2, sequence 2, suspending transaction, *ERROR* Purchase Order is valid but failed available balance check.	Insufficient Funds	Copy the cart, change the funding and re-submit the PR
Note: Exception: null org-openeai.layouts.EnterpriseLayout Exception; Error setting OrderItem/UnitofMeasure	Invalid Unit of Measure	Report error to the HokieMart help line
Note: Exception creating the PurchaseOrder object. Error ORA-20100: Accounting Record Errors for sequence 1, *ERROR* User SCRUNKIL does not have authority to post to chart U, Fund 77222, and Organization 005085	User does not have access in Banner to charge PR to fund or organization code.	On-Behalf-Of Requestor must enter “prepared for” user. Requestor should contact Controller’s Office to research Banner access.

Error Message	Definition of Message	Action to Correct
Note: Exception creating the PurchaseOrder object. Error:)RA-20100: Document Edit errors, *ERROR* Account Type must be either General Ledger, Expenditure, or Transfer	Revenue account code was used instead of expense account code.	Copy the cart, change the account code to an expense code, and re-submit the PR.
Note: Exception creating the PurchaseOrder object. Error: ORA-20100: Commodity Errors for item 1, *ERROR* Quantity must be greater than 0.	Quantity of 0 was entered	Copy the cart, enter the quantity, and re-submit the PR.

Frequently Used Account Codes

Account Code	Description	HokieMart Form
12130	Messenger Service, Private or State Courier	FedEx - Direct Pay (Payment Code C1) UPS (Non-Catalog - HokieMart Will **Not** Deliver)
12150	Digital Print Services	IPR
12152	Printing Services	IPR
12210	Organization Memberships	Direct Pay (Payment Code A16)
12220	Publication Subscriptions	Direct Pay (Payment Code E5)
12480	Media Services (advertising in magazines, newspapers, etc.)	Direct Pay (Payment Code E3)
12897	Employee Training Courses, Workshops, and Conferences (Registration fees)	Direct Pay (Payment Code E1)
13120	Office Supplies – General	Non-Catalog Item, Punchout (depending on supplier)
13410	Laboratory Supplies – General (check other codes for specific supplies)	Non-Catalog Item Punchout (depending on supplier)
1341A	Supplies, Materials & Equipment Respirators (EHSS Approval)	Punchout (depending on supplier)
13740	Educational Supplies (blank audio/video tapes, chalk, erasers, etc.)	Punchout (depending on supplier)
13747	Textbooks	Direct Pay (Payment Code E5) (directly from Publisher or Producer only)
22625	Office Furniture (less than $2,000 per unit)	Non-Catalog Item Punchout (depending on supplier)
22620	Office Furniture (more than $2,000 per unit)	Same as above

These account codes do not include those used for travel expenses. Those are processed on a travel voucher.

A complete listing of account codes may be found on the Controller's Office website: **www.co.vt.edu**.

Please direct questions on the use of the codes to:
Bettina Simerly, **bbsimer@vt.edu**, 540-231-8616.

Guidance for Reconciling HokieMart Transactions in Banner

The Controller's Office, in coordination with Internal Audit, has revised "Procedure 10305a: Review of Financial Activities" to provide guidance for reviewing Banner Financial transactions in relation to the HokieMart. See the revised procedure at http://www.co.vt.edu/procedures/p10305a.htm. Please direct questions to Stacy King (kings@vt.edu**,** 1-8624**).**

Purchasing Card

The Purchasing Card (P-Card) is available as an optional method for purchasing goods and services. University policy is that the P-Card may be used for the following transactions. Over-the-counter sales with local vendors:

- Purchases from the US Post Office
- Airfare
- Membership and association dues
- Conference and course fees, seminars/training, and other registration fees
- Advertising for employment opportunities and other announcements
- With vendors that do not accept HokieMart see **http://www.procurement.vt.edu/HokieMart/xvendors.html**
- Any other Category on the Direct Pay List that that is marked (eVA exempt) see **http://www.policies.vt.edu/3220.pdf**

All other types of transactions should be processed in the HokieMart.

- **Cautions:** The P-Card Program is not to be confused with the **Travel Card Program** which is used by employees when on business travel. The only exception to this is airfare and mass transit purchases may be charged to the P-Card. The P-Card is for university purposes only; personal use is not allowed under any circumstances. The pre-set transaction ceiling shall not be circumvented by "splitting" orders (i.e., placing more than one order in an attempt to purchase goods or services valued over the pre-set transaction limit).

For security and fund management reasons, departments must request transactions and monthly limits when applying for a card. An analysis of monthly departmental expenditures must be performed to determine the proper card limit. The average card expenditure is between $100 and $200. A card holder may not, under any circumstances, authorize any charge in excess of the transaction limit set by the Program Administrator. If a cardholder authorizes a charge in excess of the per transaction limit established for that card, whether by splitting the invoice, encouraging the vendor to circumvent the Credit Card Company denial, or any other means, the card may be revoked for a minimum of three months. Repeat offenses may result in permanent revocation.

Please contact Debra Reed (dbales@vt.edu), 231-8548, for any questions concerning the Purchasing Card.

Purchase Order/Invoice Exception Report

The finance web report titled "Purchase Order/Invoice Exception report" was developed to assist departments using HokieMart. The report compares invoice amounts to purchase orders and denotes the exceptions. This report can be a good tool when reconciling month-end reports.

The report specifically identified the following items:

- Shipping charges which were paid but no included in the purchase order amount.
- Fund or account changes on the invoice which differs from where the original PO encumbered the funds.
- Invoice amount is greater than the purchase order amount.

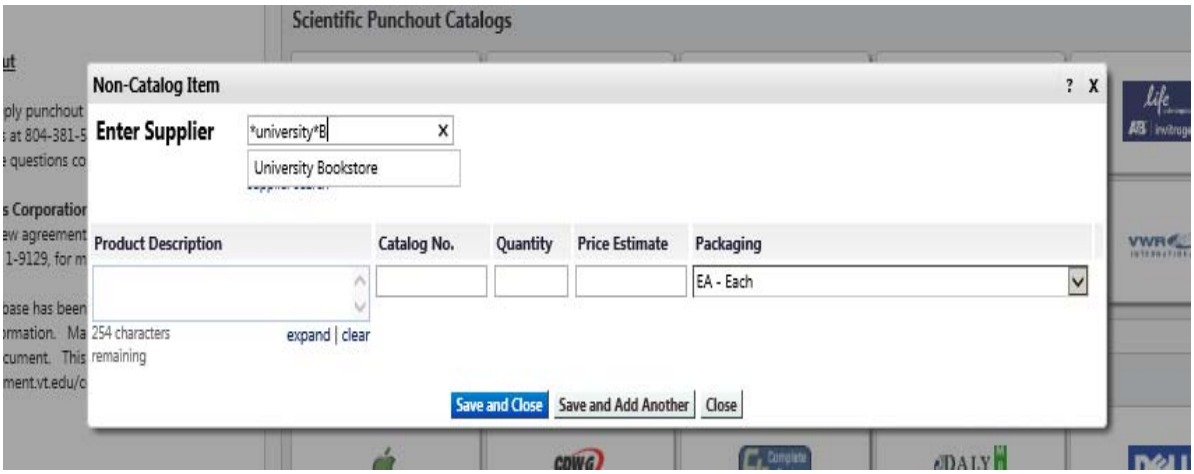
Please contact Stacy King (kings@vt.edu**) if you have questions about this report.**

University Bookstore Purchases

Use HokieMart or P-card

All purchases from the on-campus University Bookstore or the off-campus Volume Two Bookstore (Virginia Tech Services, Inc.) can be made with a HokieMart PO on a Non-Catalog form or by using a department university purchasing card (P-card).

In HokieMart do a supplier search for *University*Bookstore*



If using HokieMart PO option to purchase from the bookstore, the HokieMart PO should be printed and taken to the bookstore to obtain the goods.

- No paper signatures are required on the form since it has been electronically approved in HokieMart. The department should estimate the price of the goods if the price is not known in advance.
- If you need assistance estimating the cost, you can call the University Bookstore at 231-5991, ext.154.
- If the department plans to pick up the goods from the bookstore, an external note should be entered on the HokieMart purchase request indicating "PICKUP" and the location of the bookstore.

The department will need to complete the receiving report in the HokieMart when the goods have been obtained. *(See the Receiver User Guide for information related to receiving).*

Vendors That Do Not Accept HokieMart POs

Please refer to the Procurement Department link:

http://www.procurement.vt.edu/HokieMart/xvendors.html

which provides a detailed listing of vendors that do not accept HokieMart purchase orders. Please refer to this listing before processing a PR (especially when trying to process PRs to a **.com)**.

Vendor Query Tips & Tricks

HokieMart displays only the current vendor name from Banner. If you do not know the precise name in the HokieMart database, the vendor search can be difficult.

- To locate a **hotel** in HokieMart, include the name of the city/town in the query. Not all entries will include the location as part of the official name, but performing the query this way should shorten your search time.
- To locate an **association**, try to query by the acronym or the complete association name.

Examples:

Vendor	Query As	Explanation
John Q Smith	JohnSmith	Most names include a middle name or initial
Graystone Group	Graystone	Full name is "GBSA Inc dba Graystone Group Advertising"
Holiday Inn Richmond	HolidayInnRichmond*	Location may be part of the vendor's official name
Roanoke Post Office	PostRoanoke	The official name is "Postmaster Roanoke." Including the location will restrict the number of results, and by limiting the keyword to Post you will be able to locate Post Office, Postmaster, or Postal.
International Association of Administrative Professionals	IAAP or International Association of Administrative Professionals	
Virginia Department of Taxation	VDTax	Generally all state agency departments are set up as "VA Department of …" and are separate entities rather than being grouped together under the Commonwealth of Virginia.